Intelligent Contact Center Set Up and Operation Guide

BCM 5.0

Contact Center

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Chapter 1
Getting started

About this Guide

The *Contact Center Set Up and Operation Guide* describes how to set up and configure Contact Center on a Business Communications Manager (BCM) using CallPilot Manager and telset based administration. The information in this document applies to both the BCM50 and the BCM450 platforms running BCM Release 5.0.

About Contact Center

Contact Center is an application that handles incoming calls as efficiently and economically as possible. Contact Center answers calls, then routes the calls to agents in a skillset that most closely matches the needs of the caller. Calls can be routed based on the origin of the call, the destination of the call, or the information entered by the caller. Callers can be given high or low priorities. Callers can overflow to different groups or skillsets of agents, transfer out of the system, leave a message, and hear announcements or informative messages.

You set up and operate Contact Center through CallPilot Manager, the web-based interface, and from a display telephone. Contact Center, as part of CallPilot, supports two user interfaces: Norstar Voice Mail (NVM) and CallPilot. The default setting is NVM. See the *CallPilot Manager Set Up and Operation Guide* (NN40170-300) for more information about choosing an interface.

Contact Center Update

Intelligent Contact Center is the evolution of the existing Call Center capability on BCM. Intelligent Contact Center offers additional functionality, such as Reporting for Contact Center and Multimedia Contact Center. You can also choose the specific number of agents and skillsets that your business requires.

You purchase Intelligent Contact Center and then purchase the number of agents, skillsets, Reporting, and Multimedia as required. Intelligent Contact Center has increased maximum capacities, for example 80 active agents and 50 skillsets for BCM450, and 50 active agents and 30 skillsets for BCM50. Table 1 shows the capacities available for the BCM450 system. Table 2 shows the capacities available for the BCM50 system.

Table 1 Intelligent Contact Center Capacities for BCM450

Features	**Intelligent Contact Center for BCM450**
Skillsets	Default 1, maximum 50
Configured agents (available agent IDs)	Maximum 250
Active agents (includes supervisors) Active agents are agents who are logged on to one skillset or a combination of skillsets.	Default 2, maximum 80
Dynamic agent priority levels	20
Dynamic call priority levels	20
Active calls in all skillsets	100
Maximum active calls per skillset	100
Maximum lines configured for Contact Center	100
Voice ports with CEC	63
Voice ports without CEC	35
Voice ports used for fax with CEC	8
Voice ports used for fax without CEC	4
Routing tables per skillset	2
Greetings	150
Maximum time per greeting	1000 mins
Maximum time for all greetings	>370 hours / Gigabyte
Steps per routing table	20
Overflow rules per skillset	20
Skillset mailboxes One mailbox is created for each configured skillset. No skillset mailbox is configured by default and a maximum 50 skillset mailboxes can be configured.	Default 0, Maximum 50
Supervisor functionality, including call monitoring	Silent monitor
Supervisor Help	Available with Silent Monitor.
Maximum simultaneous monitoring sessions without CEC	20
Maximum simultaneous monitoring session with CEC	40
Caller Input Tables	50
Basic Intelligent Caller Input Routing: the ability to route a call to an Operator, Auto Attendant, skillset mailbox or CCR Tree.	Available

Features	Intelligent Contact Center for BCM450
Advanced Intelligent Caller Input Routing: the ability to route a call based on multidigit fixed or variable strings	Available
Delegated Contact Center Administration: the System Administrator can create a password to give a Contact Center Administrator or supervisor access to Contact Center administration.	Available
Intelligent Overflow Routing: rules you create to overflow, change the priority of, and move calls to multiple skillsets, a skillset mailbox, an internal or external number, a mailbox, the Auto Attendant or an operator.	Available
Intelligent CLID/DNIS Routing	1000 rules
Overflow skillsets	Default 0, maximum 49
Service Mode: you specify the start and end times for the day and night skillset for each day of the week	Available
Limited Feature 983 telephone administration	Available
CallPilot Manager	Available
Reporting for Contact Center	Available Must be enabled with keycode
Expected Wait Time	20 tables
Activity Codes	2,000 entries Reporting for Contact Center must be enabled to configure Activity Codes
Multimedia Contact Center	Available Must be enabled with keycode

Table 2 Intelligent Contact Center Capacities for BCM50

Features	**Intelligent Contact Center for BCM50**
Skillsets	Default 1, maximum 30
Configured agents (available agent IDs)	Maximum 100
Active agents (includes supervisors) Active agents are agents who are logged on to one skillset or a combination of skillsets.	Default 2, maximum 50
Dynamic agent priority levels	20
Dynamic call priority levels	20
Active calls in all skillsets	30
Maximum active calls per skillset	30
Maximum lines configured for Contact Center	30
Voice ports (shared with Callpilot or dedicated)	Minimum 2, default 10, maximum 10
Routing tables per skillset	2
Greetings	50
Maximum time per greeting	30 mins
Maximum time for all greetings	1500 mins
Steps per routing table	20
Overflow rules per skillset	20
Skillset mailboxes	Default 0, Maximum 30
Supervisor functionality, including call monitoring	Silent monitor
Supervisor Help	Available with Silent Monitor.
Maximum simultaneous monitoring sessions	6
Caller Input Tables	30
Basic Intelligent Caller Input Routing: the ability to route a call to an Operator, Auto Attendant, skillset mailbox or CCR Tree.	Available
Advanced Intelligent Caller Input Routing: the ability to route a call based on multidigit fixed or variable strings	Available
Delegated Contact Center Administration: the System Administrator can create a password to give a Contact Center Administrator or supervisor access to Contact Center administration.	Available

Features	Intelligent Contact Center for BCM50
Intelligent Overflow Routing: rules you create to overflow, change the priority of, and move calls to multiple skillsets, a skillset mailbox, an internal or external number, a mailbox, the Auto Attendant or an operator.	Available
Intelligent CLID/DNIS Routing	1000 rules
Overflow skillsets	Default 0, maximum 29
Service Mode: you specify the start and end times for the day and night skillset for each day of the week	Available
Limited Feature 983 telephone administration	Available
CallPilot Manager	Available
Reporting for Contact Center	Available Must be enabled with keycode
Expected Wait Time	5 tables
Activity Codes	2,000 entries Reporting for Contact Center must be enabled to configure Activity Codes
Multimedia Contact Center	Available Must be enabled with keycode

Contact Center features

Contact Center has many features that give your Contact Center advanced and flexible call handling.

Intelligent Routing	Intelligent Routing gives you advanced methods for routing calls through your Contact Center. How calls are directed is based on various input conditions. Intelligent CLID/DNIS Routing: • routes calls according to CLID/ANI, DNIS, ISDN Calling Number • is applied when calls first enter the Contact Center Intelligent Caller Input Routing, Basic: • is the ability to route calls to the Auto Attendant, a Custom Call Routing (CCR) Tree, the operator, or a skillset mailbox • routing is applied when the caller presses a telephone button in response to instructions played in a greeting Intelligent Caller Input Routing, Advanced: • includes the Basic capabilities, plus the ability to create rules that route calls to other skillsets and locations depending on the caller input • enables you to change the priority of the call Intelligent Overflow Routing: • routes calls to an extension, other skillsets, the operator, a mailbox, an external phone number, the Auto Attendant, a skillset mailbox, or a CCR Tree • enables you to change the priority of the call
Flexible routing steps	You can assign these routing steps to Day and Night Routing Tables, Overflow and Advanced Call Input Routing: • transfer to a mailbox • transfer to an extension • transfer to an external telephone number • transfer to the Auto Attendant • transfer to an operator • transfer to a skillset mailbox • transfer to a CCR Tree • move to another skillset using Advanced Call Input Routing • play a recorded greeting • play an Expected Wait Time Greeting • Distribute • Disconnect
Dynamic agent priority	You can assign agents different priority levels depending on the skillset to which they are logged on.
Choice of call presentations	You can assign agents forced calls, or let agents answer calls manually.

Dynamic call priority	You can have the priority of a call changed in the Intelligent CLID/DNIS Routing table, the Intelligent Caller Input Routing Table and the Intelligent Overflow Routing table. With call priority, all calls that have a higher priority are handled before lower priority calls, no matter how long the lower priority calls are waiting. For an example of using Intelligent Overflow Routing to control call priority, see "Example 2" on page 121.
Delegated access to Contact Center	You or the System Administrator can create a username and password to give a supervisor access to Contact Center administration.
Multimedia Contact Center	If you have Multimedia Contact Center enabled, agents can have multimedia sessions with callers through the internet. Callers click an HTML link to connect to the Contact Center.
CallPilot Manager	CallPilot Manager is a web-based interface you can use to administer CallPilot and Contact Center.
Call monitoring	Agents can monitor the call activity in the skillsets they are logged on to. You and supervisors can monitor the call activity per skillset or on a system wide basis.
Reporting for Contact Center	You can generate the System Configuration report to view Contact Center settings. If you have Reporting for Contact Center enabled, you can view real time statistics and comprehensive management information about the day-to-day performance of your Contact Center. See the *Reporting for Contact Center Setup and Operations Guide* (NN40040-602) for more information.

Using CallPilot call routing with Contact Center

CallPilot is a versatile business communications tool that you can use to:

- answer incoming calls
- offer callers a selection of options to route their calls or access information
- provide advanced voicemail, Auto Attendant and call handling capabilities

CallPilot has two powerful call routing features: Auto Attendant (AA) and Custom Call Routing (CCR). These features route incoming calls to telephones and voice mailboxes. You can also use these features to route calls to Contact Center skillsets.

Auto Attendant

The Auto Attendant answers incoming calls and presents callers with a greeting. After the greeting, the Auto Attendant Menu offers callers a range of options that they can select using the dialpad of their telephone. Using these options, callers can transfer themselves from the Auto Attendant to a skillset by entering the Control DN of the skillset.

Note: Include the number of the Control DN in your Auto Attendant Greeting.

For information about how to configure the Auto Attendant, see the *CallPilot Set Up and Operation Guide* (NN40090-300).

Custom Call Routing (CCR)

With CCR you can replace the Auto Attendant menu with an expanded menu that can include several sub-menus to offer callers a wider range of options. You can give callers access to a Contact Center skillset by adding an internal transfer that transfers the caller to the Control DN of the skillset.

For more information about transfers and CCR, see the *CallPilot Manager Set Up and Operation Guide* (NN40090-300).

Audience

This guide is for system administrators who configure and maintain Contact Center on a BCM. To use this guide you must:

- be an authorized system administrator
- be knowledgeable of CallPilot and Contact Center

Acronyms

The following is a list of acronyms used in this guide.

Table 1

Acronym	Description
BCM	Business Communications Manager
CCR	Custom Call Routing
CDN	Control Directory Number
CFAC	Call Forward All Calls
CFB	Call Forward on Busy
CFNA	Call Forward No Answer
CLID	Calling Line Identification

Table 1

Acronym	Description
CO	Central Office
COS	Class of Service
DID	Direct Inward Dialing
DN	Directory Number
DND	Do Not Disturb
DTMF	Dual Tone Multi-Frequency
EWT	Expected Wait Time
MWI	Message Waiting Indication
NVM	Norstar Voice Mail

Symbols and text conventions

These symbols are used to Highlight critical information for the BCM system:

Caution: Alerts you to conditions where you can damage the equipment.

Danger: Alerts you to conditions where you can get an electrical shock.

Warning: Alerts you to conditions where you can cause the system to fail or work improperly.

Note: A Note alerts you to important information.

Tip: Alerts you to additional information that can help you perform a task.

Security note: Indicates a point of system security where a default should be changed, or where the administrator needs to make a decision about the level of security required for the system.

Warning: Alerts you to ground yourself with an antistatic grounding strap before performing the maintenance procedure.

Warning: Alerts you to remove the BCM main unit and expansion unit power cords from the ac outlet before performing any maintenance procedure.

These conventions and symbols are used to represent the Business Series Terminal display and.

Convention	Example	Used for
Word in a special font (shown in the top line of the display)	Pswd:	Command line prompts on display telephones.
Underlined word in capital letters (shown in the bottom line of a two line display telephone)	PLAY	Display option. Available on two-line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons	#	Buttons you press on the dialpad to select a particular option.

These text conventions are used in this guide to indicate the information described.

Convention	Description
bold Courier text	Indicates command names and options and text that you need to enter. Example: Use the **info** command. Example: Enter **show ip** {**alerts**|**routes**}.
italic text	Indicates book titles
plain Courier text	Indicates command syntax and system output (for example, prompts and system messages). Example: Set Trap Monitor Filters
FEATURE HOLD RELEASE	Indicates that you press the button with the coordinating icon on whichever set you are using.

Related Publications

This guide refers to the following additional documents:

CallPilot Manager Set Up and Operation Guide (NN40170-300)

CallPilot Telephone Administration Guide (NN40170-601)

CallPilot Contact Center Telephone Administration Guide (NN40170-600)

Contact Center Agent Guide (NN40040-101)

Contact Center Supervisor Guide (NN40040-102)

Keycode Installation Guide (NN40010-301)

How to get Help

This section explains how to get help for Nortel products and services.

Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

http://www.nortel.com/support

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting Help over the phone from a Nortel Solutions Center

If you don't find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

http://www.nortel.com/callus

Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

http://www.nortel.com/erc

Getting Help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

Chapter 2
About setting up Contact Center

You can set up Contact Center using a display telephone on your phone system, or using the web-based CallPilot Manager on a web browser from a computer on your network. For some Contact Center tasks, such as initializing skillset mailboxes, you must use a phone. See the *Contact Center Telephone Administration Guide* for more information.

Using CallPilot Manager to set up Contact Center

CallPilot Manager operates on your Business Communications Manager (BCM) system. You access CallPilot Manager on a web browser from a computer on your network.

System requirements

Before you use CallPilot Manager, you must enable CallPilot and Contact Center on your BCM. You enable CallPilot and Contact Center with a keycode. To enable keycodes see "Enabling keycodes" on page 27.

Note: For information about computer and browser requirements for CallPilot Manager and Contact Center, see the *CallPilot Manager Set Up and Operation Guide* (NN40170-300).

Enabling keycodes

You enable keycodes to activate Intelligent Contact Center, to increase the number of agents in your Contact Center, to increase the number of skillsets, and to enhance your Contact Center with options such as Multimedia Contact Center and Reporting for Contact Center.

To enable a keycode for Business Communications Manager

1. Log on to Element Manager and select the Business Communications Manager you want to access.
   For information about logging on to Element Manager, see the *BCM 5.0 Administration and Security Guide*.
2. On the Task Navigation Panel, click the **Configuration** tab.
   The configuration folders display.
3. Click the **System** folder and then click the **Keycodes** task.
   The Keycodes panel appears.

4 Click **Load File.**
The Open file dialog box appears.

5 Browse to where you saved the keycode file you downloaded from KRS.

6 Click **Open**.
The file uploads and the feature appears in the Keycodes list.

Note: See the *Keycode Installation Guide* for more information.

Starting CallPilot Manager

To start CallPilot Manager on BCM

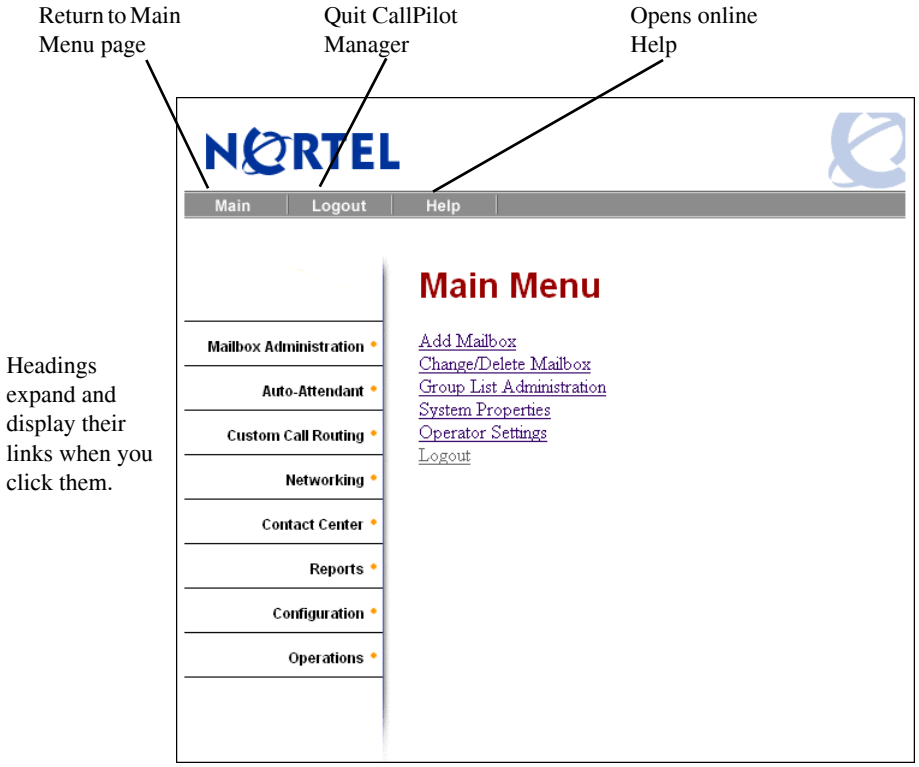
1 Log on to Element Manager and select the BCM you want to access.
For information about logging on to Element Manager, see the *BCM 5.0 Administration and Security Guide*.

2 On the Task Navigation Panel, click the **Configuration** tab.
The configuration folders display.

3 Click the **Application** folder and then click the **Voice Messaging/Contact Center** task.
The Voice Messaging/Contact Center panel appears.

4 Click **Launch CallPilot Manager.**
The CallPilot Manager Main Menu web page opens.

About the CallPilot Manager interface



System timeout

A CallPilot Manager session times out after 10 minutes of inactivity. This is a security feature that prevents unauthorized access to the system.

If your session times out, the login page appears and a message that says that the session has expired. You must log on to continue programming Contact Center.

If the system times out while you are working on a page, any settings that you have not entered on the system by pressing the Submit button are not entered.

Contact Center access

If you use a BCM system, there is no dedicated or default CallPilot or Contact Center Administrator user ID and password. For BCM, you can create users with CallPilot and Contact Center rights in Element Manager. You can also change the users' passwords in Element Manager.

All settings under the Contact Center heading in CallPilot Manager are available, once you have set up Contact Center access in Element Manager.

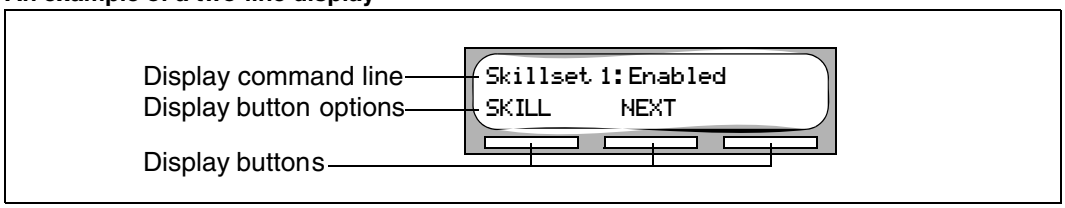
For information about Contact Center access rights, see the *BCM 5.0 Administration and Security Guide*.

Setting up Contact Center from a two line display telephone

In addition to using CallPilot Manager, you can set up Contact Center with a two line display telephone using F983.

Two line display phones show CallPilot and Contact Center commands and options. A two-line display can show up to three display options at once. In some instances, an option does not have a corresponding display button, and you must select the option by pressing buttons on the dialpad.

An example of a two-line display



Contact Center agents can use two line display telephones and one line display telephones. Supervisors must use two line display telephones with the handsfree mute feature. Telephones without a display, such as telephones attached to an analog terminal adapter, cannot be used for Contact Center agent tasks. Nortel recommends that you read the telephone user card for your telephone before proceeding. For more information, see the *CallPilot Contact Center Telephone Administration Guide).*

System timeout

If you pause longer than two minutes (120 seconds) when you program Contact Center on a two line display telephone, the system times out and ends the session. This safety feature prevents unauthorized use of the system.

If the system times out while you are setting up Contact Center, the settings are still entered in the system. To continue programming, you must log on again and change the settings.

Using the dialpad

The buttons on your display telephone dialpad act as both numbers and letters. Each button represents a number and letters of the alphabet.

To enter a character	Press the dialpad button that represents the letter or number. Press the button again to see the next letter or number.
To accept a character	Press # or press another button. When you press another button, the cursor advances, and the display shows the first character on the new button.
To delete a character	Press the BKSP display button.

Letters and numbers on the dialpad

1 1 ’ -	2 A B C 2 a b c	3 D E F 3 d e f
4 G H I 4 g h i	5 J K L 5 j k l	6 M N O 6 m n o
7 P Q R S 7 p q r s	8 T U V 8 t u v	9 W X Y Z 9 w x y z
* Quit	0 Q Z Zero q z	# Accepts the displayed letter enters a comma (,)

The display can show up to 16 characters. The prompt remains on the display if you enter fewer than ten characters. If you enter information where the prompt and the information is fewer than 16 characters, you can see both the prompt and the information you enter.

```
Pswd:1111
OTHR   RETRY   OK
```

This is an example of a display with fewer than 16 characters, where the command line prompt remains on the display.

```
Name:
RETRY   BKSP   OK
```

This display shows the `Name:` command line prompt.

```
P
RETRY   BKSP   OK
```

When you begin to enter the last name, the `Name:` command line prompt disappears. For example, if you enter the name Partridge, you press 7 for P, and the display drops the `Name:` prompt.

PARTRIDGE RETRY BKSP OK

Although the name is only nine characters long, the command line prompt is not shown on the display after you enter the entire name.

The prompt disappears for these command line prompts:

- Name:
- Log:
- Dest ph:

Symbols and conventions used in this guide

These conventions and symbols are used to represent the Business Series Terminal display and dialpad.

Convention	Example	Used for
Word is in a special font (in the top line of the display)	Pswd:	Command line prompts on display telephones.
Underlined word in capital letters (shows bottom line of a two line display telephone)	PLAY	Display option. Available on two-line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons	#	Buttons you press on the dialpad to select a particular option.

About telephone buttons

This table shows the Business Series Terminal buttons. Use the buttons that pertain to the type of telephone you use.

Button name	T7100, T7208, T7316	M7100, M7208, M7310, M7324	M7100N, M7208N, M7310N, M7324N
Feature		Feature	Fx
Handsfree	Bottom right-hand button	Handsfree Mute	Handsfree Mute
Hold		Hold	
Volume Control			− +
Release		Rls	

You can enter , Feature or Fx and the code to use a feature.
For example, press 9 8 1 to access your mailbox.

The T7100 works differently from other telephones on your system because it does not have line buttons. Where other telephones require that you select a line button to answer a call, on the T7100 terminal you pick up the handset. Where other telephones require you to select a line button to take a call off hold, you press [ ] on the T7100 terminal.

On T7100 terminals, you can answer a second call by pressing [ ]. Your active call is put on hold and you connect to the waiting call. You can have no more than two active calls at one time.

Checking which telephone mailbox interface you use

CallPilot supports two interfaces: Norstar Voice Mail and CallPilot.
The System Administrator determines which interface is assigned to your mailbox.

Follow the procedures in this guide that apply to the interface you use.
Some procedures apply to both interfaces.

To check which mailbox interface you use

1. Press [ ] [9] [8] [1].
   Follow the voice prompts or the display button options to open your mailbox.

2. Check the display to see which interface you use:

   This is the Norstar Voice Mail interface.

```
0 new  0 saved
PLAY   REC   ADMIN
```

   This is the CallPilot interface.

```
No messages
COMP   MBOX   EXIT
```

3. Press [ ] to end the session.

Chapter 3
Using Feature Codes

You use Feature Codes to perform Contact Center functions on your telephone.

Feature Codes

Feature Codes are assigned during installation. This guide shows the default Feature Codes. Contact Center can also use custom Feature Codes. If the default Feature Codes are used by another application, your system automatically assigns custom Feature Codes. If your System Administrator has assigned custom Feature Codes, you can use the table "Feature Codes" on page 236 to record the Custom Feature Codes.

To determine the Feature Codes

1. Press [e] [9] [*] [1].

```
Login/out:    F9xx
              NEXT
```

2. The display shows the name and number of the Log In/Log Out Feature Code. xx represents a number between 00 and 99.

3. Press NEXT.

```
Ready Mode:   F9xx
              NEXT
```

4. The display shows the name and number of the Ready Mode Feature Code.

5. Press NEXT to see more Feature Codes.

6. When the display shows QUIT you have seen all the Feature Codes.

7. Press [☎] to end the session.

Programming a memory button with a Feature Code

Each Feature Code can be programmed to a memory button. We recommend that you use memory buttons with indicators to program the Feature Codes. A memory button indicator is the triangle next to a memory button.

You can use memory buttons to monitor call activity, and view the Login/Logout and Not Ready status of agents. For information about how the status appears, see the *Contact Center Agent Guide* (NN40040-101).

For information about using programmed memory buttons to monitor call activity, see "Skillset properties" on page 54.

To program a memory button

1 Press [✆] [*] [3].
Do not lift your handset.

```
Program Features
```

2 The display shows `Program Features`.

```
Press a button
QUIT
```

3 Press a memory button with an LCD indicator.

```
Feature Code:
QUIT
```

4 Press [✆].

```
F_
QUIT    CLEAR
```

5 Enter the Feature Code number that you want to program. For example, enter [9] [0] [9] to program the Display Waiting Calls Feature Code. See the tables "Feature Codes used by Contact Center agents" on page 38 and "Agent Feature Codes" on page 38 for the Feature Codes.

Repeat steps 1 through 5 for each Feature Code you want to program.

```
Programmed
```

6 The display shows that the button is programmed, and then ends the session.

Use the paper labels that come with your telephone to identify the programmed button. To use the Feature Code, press the labeled button.

Feature Codes used by Contact Center Administrator and Supervisors

Use this Feature Code	To...
Open Mailbox [✆] [9] [8] [1]	• open skillset mailboxes • record skillset mailbox greetings • listen to messages in the skillset mailbox
Operator Settings [✆] [9] [8] [2]	• set or change the operator extension • indicate whether the operator is available • select the day and night service modes for skillsets • change the password for Operator Settings For more information on using the Operator Feature Code, see "Setting the Service Mode for skillsets" on page 146 and "Resetting the Operator password" on page 227.
Voicemail DN [✆] [9] [8] [5]	• display the skillset mailbox number (Control DN) for each skillset • display the extension for Message Waiting Indication for the skillset mailbox • reset the passwords of the Contact Center Administrator and the operator For more information about the Control DN, see "Determining a skillset mailbox number" on page 71.
Display Waiting Calls Skillset Status [✆] [9] [0] [9]	• view real-time status information about skillsets. You can see how busy your Contact Center is so that you can adjust skillset staffing • view whether a skillset is enabled or disabled • view the number of agents logged on to the skillset • view the number of calls waiting • view the longest wait time of a call To provide easy, one-button access to this feature, program a memory button that has an indicator with [✆] [9] [0] [9]. Refer to "Programming a memory button with a Feature Code" on page 36.
Log on/Log off [✆] [9] [0] [4]	• log on or off.
Monitor agents [✆] [9] [0] [5]	• lets you monitor agents
Supervisor Help [✆] [9] [0] [6]	• lets you take agents' help requests
Not Ready [✆] [9] [0] [8]	• extend a Break Time period if agents need time after calls to do paperwork or wrap up tasks. For more information about Break Time properties for a skillset, see "Break Time" on page 54.
Record a Call [✆] [9] [8] [9]	• record an active telephone call. The recorded message is usually placed in your mailbox. With appropriate setup, the call can also be placed as a .wav file in a network location.
Professional Call Recording [✆] [9] [9] [5]	• record an active call, a three-party conference call, a multi-party conference call, a Meet-Me Conferencing conference call, a privacy conference call or a silently monitored call for hunt groups or Contact Centers. The feature delivers the recorded call as a WAV file, together with the call log data, to an email address or it is streamed to a server. Professional Call Recording works through the provisioning of recording rules which the system administrator configures.

Note: You can use The Log on/Log off and the Not Ready Feature Codes, but they are used primarily by agents. For information about the Feature Codes used by agents, see "Feature Codes used by Contact Center agents" on page 38.

Note: While you use a feature, if you press the Feature button your present feature session ends. Do not press unless you want to end your current feature session.

Feature Codes used by Contact Center agents

If you have Custom Feature Codes, record them in the table "Feature Codes" on page 236.

Agent Feature Codes

For more information about Agent Feature Codes, see the *Contact Center Agent Guide (NN40040-101)*. For more information about Feature Codes used by supervisors, see the "Feature Codes used by Contact Center Administrator and Supervisors" on page 37.

Agents use this Feature Code	To...
Open Mailbox 9 8 1	• access messages in a skillset mailbox
Log on/Log off **Monitor skillsets** 9 0 4	• log on when they are in the office • view the status of the skillsets they are logged on to. Agents can program a memory button with the Log on/Log off Feature Code. The status of the calls waiting in the skillset is shown by the flash rate of the indicator. For more information, see "Skillset properties" on page 54.
Supervisor Help 9 0 6	• requests help from a supervisor
Activity Codes 9 0 7	• start a session where they can enter Activity Codes • For more information about Activity Codes, see "Activity Codes" on page 187.
Not Ready 9 0 8	• activate or cancel the Not Ready feature on their telephone. If the work resulting from a call requires extra time to complete, an agent can use the Not Ready Feature Code to prevent Contact Center from routing another call to them. If an agent makes a phone call, or if a supervisor is monitoring a call, they first use the Not Ready Feature Code to make themselves busy. When the agent is ready to receive calls, they use this Feature Code to cancel the Not Ready feature and receive calls again. • If an agent does not answer a call within a certain number of rings, the call is returned to the skillset and the agent telephone is automatically placed into Auto Busy Mode or Auto Logout Mode. The agent must manually cancel the Auto Busy Mode feature by using the Not Ready Feature Code to continue to receive calls.

Display Waiting Calls [✆] [9] [0] [9]	• Agents who answer calls only during peak call periods can use Display Waiting Calls to see which skillsets have the most call activity. • view the status of calls in all skillsets. Agents can program a memory button with the Display Waiting Calls/Monitoring calls. The status of calls waiting is shown by the flash rate of the indicator. For more information see "Skillset properties" on page 54.
Record a Call [✆] [9] [8] [9]	• record an active telephone call. The recorded message is usually placed in your mailbox. With appropriate setup, the call can also be placed as a .wav file in a network location.
Professional Call Recording [✆] [9] [9] [5]	• record an active call, a three-party conference call, a multi-party conference call, a Meet-Me Conferencing conference call, a privacy conference call or a silently monitored call for hunt groups or Contact Centers. The feature delivers the recorded call as a WAV file, together with the call log data, to an email address or it is streamed to a server. Professional Call Recording works through the provisioning of recording rules which the system administrator configures.

Note: While you are using a feature, if you press the Feature [✆] button your present feature session ends. Do not press [✆] unless you want to end your current feature session.

Chapter 4
Setting up Contact Center agents

Agents handle the calls in your Contact Center. Supervisors are agents with additional capabilities. Supervisors can monitor calls between agents and callers.

Active agents are agents who are logged in to one skillset or a combination of skillsets. For example: if Agent 1 is logged in to skillset 1, then one agent is active. If Agent 1 is logged in to skillset 1and skillset 2, then one agent is active. If Agent 1 and Agent 2 are logged into skillset 1 then 2 agents are active. If Agent 1, Agent 2, and Agent 3 are logged into skillset 1 then three agents are active.

About adding agents

Before you can add agents to your Contact Center, you must purchase and enable a keycode for the number of agents that you want to add. The number of agents you can add to your Contact Center is determined by the number of agents the keycode enables. For information about enabling a keycode, see"Enabling keycodes" on page 27.

For more information about Contact Center agents, see the *Contact Center Agent Guide* (NN40040-101).

Agent properties

Agent ID	Each agent is assigned a unique ID number. Contact Center assigns the lowest available ID number. You can assign a different ID number. Statistics are collected and reported for each ID number. For more information about statistics, see "Monitoring call activity" on page 173 and the *Reporting for Contact Center Setup and Operations Guide*.
Name	The agent name can be a maximum of 13 characters. If you do not enter a name, a default agent name appears as the word *Agent* and the ID number, for example, *Agent12*.
Automatic Login DN	Enter the DN to which the agent is automatically logged in. With Automatic Login, you can configure agents to be automatically logged back in to Contact Center in the event of a system reboot during the business day. Agents, who are configured to be automatically logged in, are logged back in to the Contact Center when it restarts provided that the configured DN is available. For more information see, "Automatic login" on page 68.
Supervisor	Super represents the status of the agent. No in the Super column means that an agent that does not have supervisor status. Yes in the Super column means that an agent has supervisor status.
Automatic Answer	Automatic Answer is optional. Select Automatic Answer if you want to force-deliver calls to an agent. If Automatic Answer is enabled, the agent hears a tone on their telephone and headset that indicates that a call is delivered. The agent is automatically in the handsfree mode. It is important that agents use the Not Ready feature when they are not available to receive calls. If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must answer calls manually. **NOTE**: For information on how to use Automatic Answer with the telephones you use in your Contact Center, see "Automatic Answer" on page 230.
Override Skillset Break Time	The Override Skillset Break Time overrides the default skillset break time. You can configure each individual agent's break time. The time is set on an agent basis rather than on a skillset wide basis.
Not Ready Timeout	The Not Ready Timeout is for agents who have missed a call and been made busy. You configure the not ready timeout setting to automatically place the agent in the available state after a preconfigured time out. After the administrator configured wait time, agents are automatically placed back into service. Agents still retain the flexibility to manually make themselves ready. You can configure the timeout for each agent and it will override the break time configured for the skillset.
Manual Not Ready Timeout	The Manual Not Ready Timeout feature forces agents back into service after the specified time. You configure the manual not ready timeout setting, so agents, using F908, can manually place themselves back in the available state after a preconfigured time out. Agents use F908 to give themselves a break from receiving calls. If this option is not set, agents can remain in F908 indefinitely.

Audible Not Ready Notification Interval	You configure the Audible Not Ready Notification Interval so an audible tone plays at the agent's telephone set on a configurable interval as long as the agent is in the not ready state. The tone plays after the length of every interval. For example, if the interval is ten seconds and the agent enters the not ready state then a tone is not played for ten seconds and then is played every ten seconds thereafter. You must configure a not ready timeout for the agent to use the Audible Not Ready Timeout feature.
Missed Call Option	The Missed Call Option controls how a call is treated if an agent does not answer the call. Make Not Ready assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Automatic Logout automatically logs an agent out of their skillset if they do not answer a call. The default is Make Not Ready (Return to Skillset). To assign how many rings before the Missed Call Option, change the timer for Transfer Callback Timeout. If you use a BCM, see the *Nortel Business Communications Manager 5.0 Administration and Security* guide.
Activity Code Entry Type	Activity Code entry types are Prompted and Optional. If you select Prompted, the agent is prompted to enter Activity Codes on their telephone. If you select Optional, an Activity Code session is not automatically displayed on the agent's telephone, but they can press F907 and enter Activity Codes. The agent can press F907 at any time during the active call. Prompted displays F907 after the call is disconnected, but Optional does not. Optional is the default. For more information about Activity Codes, see "Activity Codes" on page 187. This option appears if Reporting for Contact Center is enabled.
Record A Call	Lets subscribers use the Record A Call feature. With Record A Call (✆ 9 8 9), you can record an active telephone call. If you want to change the Record A Call setting, select **Disabled, Announced, or Silent** from the **Record-a-call** drop-down list. The default setting is **Disabled**. The recorded message is placed in the subscriber's mailbox. With appropriate setup, the call can also be placed as a .wav file in a network location. Before you activate Record A Call, ask the parties on the call for permission to record the call. For more information about Record A Call, see the *CallPilot Manager Set Up and Operation Guide (*NN40090-300).

Max Message Length	Max Message Length is the maximum length of the recorded message. The range is 1 to 60 minutes.
Recorded Call Destination	This attribute appears only if Intelligent Call Center (ICC) keycode is installed. Select where you want the recorded call to be stored: Personal Mailbox, Skillset Mailbox, Mailbox, or SFTP destination. If you want to add or change a network location where the **Record-a-call** will be recorded (as well as the subscriber mailbox), you need to specify the appropriate SFTP destination. SFTP destinations can be specified using Element Manager. From the Element Manager, click **Configuration > Application > Voice Messaging/Contact Center** to specify the SFTP destinations. When a system administrator defines an SFTP folder as a storage location on the network, these storage locations must be on an SCP server. The BCM supports OpenSSH 3.7. **Note:** BCM does not support secure file transfer protocol (SFTP) as element manager (EM) screens in Silent Record a Call (SRC) and Backup Restore Utility (BRU) indicate. Instead, the secure copy protocol (SCP) is supported. Therefore, wherever an SFTP server is required, a server supporting SCP should be setup instead. Additionally, all instances of the phrase “SFTP” in the EM should be taken to mean “SCP.”

In addition to these agent properties, you can assign agents Dynamic Priority when you assign them to a skillset. For more information, see “Dynamic Agent Priority” on page 63.

Adding an agent or a supervisor

You can use the table “Contact Center agents” on page 240 to record the agents you add.

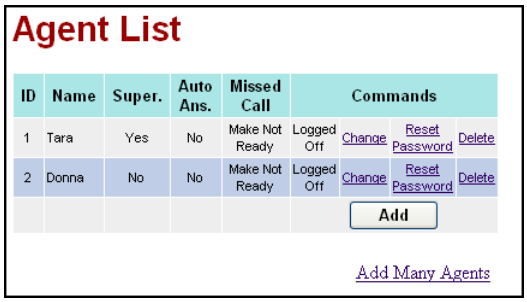
Note: When adding an agent, the Automatic Login feature does not appear. You must use the **Change** command in the Agent List to assign Automatic Login.

To add an agent

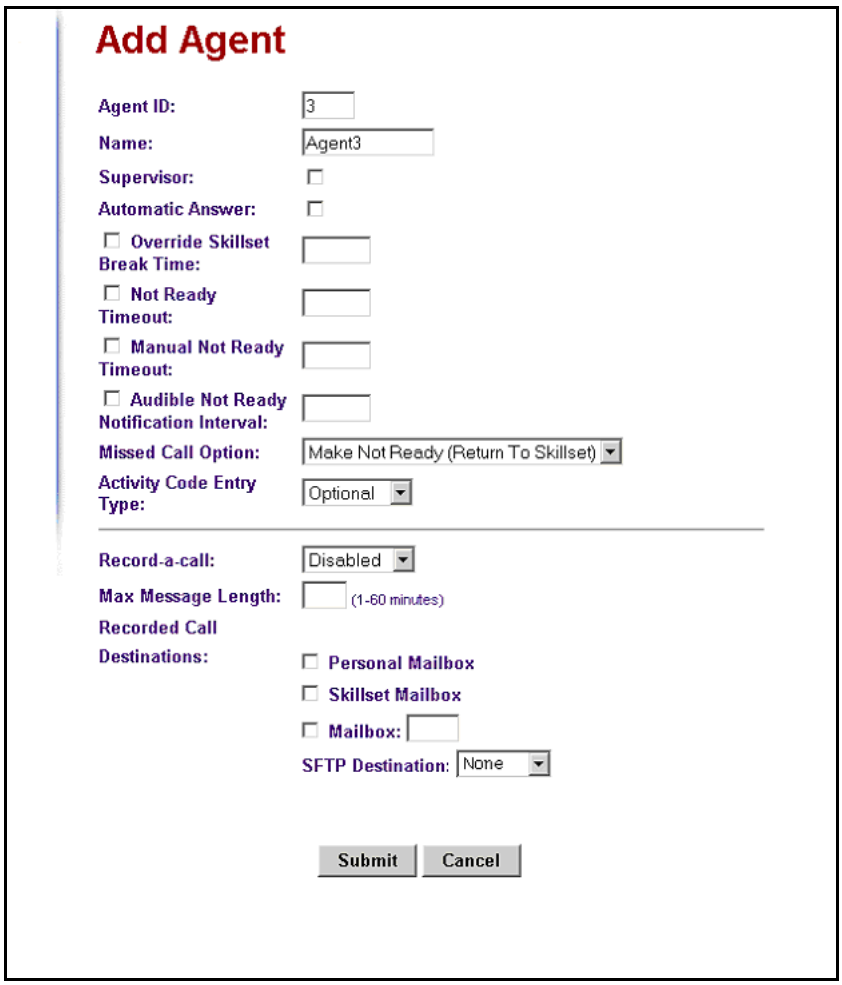
1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Agent List** link.
The Contact CenterAgent List appears.



4 Click **Add**.
The Add Agent page appears.



5 If you want to change the Agent ID number, in the **Agent ID** box type the new Agent ID.

6 In the **Name** box type the name of the agent.

7 Select the **Supervisor** check box if you want to give the agent supervisor functionality. The default is not selected.

8 Select the **Automatic Answer** check box if you want calls to be force-delivered to the agent. The default is not selected.

9 Select **Override Skillset Break Time** if you want to configure the agent's break time. The default is not selected.

10 Select **Not Ready Timeout** if you want to the agent to be automatically placed back in the available state after a pre-configured timeout.
The agent must first be in a **Not Ready** state before using this feature.

11 Select **Manual Not Ready Timeout** if you want the agent to manually place themselves back in the available state after a pre-configured timeout.

12 Select **Audible Not Ready Notification Interval** if you want to extend the **Not-Ready Timeout** feature.
The agent is notified, through the telephone set, when they are in the **Not-Ready** state.

13 From the **Missed Call Option** list box select Make Not Ready (Return to Skillset) or Automatic Logout.

14 If you use Activity Codes, from the **Activity Code Entry Type** list box select Optional or Prompted. The default is Optional.

15 Select **Record-a-call** if you want to record an active call.
If you want to change the record call setting, select **Disabled**, **Announced**, or **Silent** from the **Record-a-call** drop-down list. The default setting is **Disabled**.

16 In the **Max Message Length** box, type the maximum length of the recorded message, if you choose to record a call.

17 Select the **Destination** of the recorded call.
An **SFTP** destination appears only if Intelligent Call Center (ICC) keycode is installed.
SFTP destinations can be specified using Element Manager.
When a system administrator defines an SFTP folder as a storage location on the network, these storage locations must be on an SCP server. BCM supports OpenSSH 3.7.

Note: BCM does not support secure file transfer protocol (SFTP) as element manager (EM) screens in Silent Record a Call (SRC) and Backup Restore Utility (BRU) indicate. Instead, the secure copy protocol (SCP) is supported. Therefore, wherever an SFTP server is required, a server supporting SCP should be setup instead. Additionally, all instances of the phrase "SFTP" in the EM should be taken to mean "SCP."

18 Click **Submit**.

Adding more than one agent

You can save time by adding more than one agent at a time. When you add multiple agents, the agents have the default agent name and parameters.

You can use the table "Contact Center agents" on page 240 to record the agents you add.

To add more than one agent

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Agent List** link.
   The Agent List page appears.
4. Click the **Add Many Agents** link.
   The Add Many Agents page appears.
5. In the **From** box, type the lowest agent ID number of the agents you want to create.
6. In the **To** box type the highest agent ID number of the agents you want to create.
   The Agent ID numbers you enter must be between 1 and 250.
7. Select the **Supervisor** check box if you want the agents to have Supervisor status.
8. Select the **Automatic Answer** check box if you want calls to be force-delivered to the agent.
   The default is not selected.
9. Select **Override Skillset Break Time** if you want to configure the agent's break time.
   The default is not selected.
10. Select **Not Ready Timeout** if you want the agent to be automatically placed back in the available state after a pre-configured timeout.
    The agent must first be in a **Not Ready** state before using this feature.
11. Select **Manual Not Ready Timeout** if you want the agent to manually place themselves back in the available state after a pre-configured timeout.
12. Select **Audible Not Ready Notification Interval** if you want to extend the **Not-Ready Timeout** feature.
    The agent is notified, through the telephone set, when they are in the **Not-Ready** state.
13. From the **Missed Call Option** list box select Make Not Ready (Return to Skillset) or Automatic Logout.
14. If you use Activity Codes, from the **Activity Code Entry Type** list box select Optional or Prompted. The default is Optional.
15. Select **Record-a-call** if you want to record an active call.
    If you want to change the record call setting, select **Disabled**, **Announced**, or **Silent** from the **Record-a-call** drop-down list. The default setting is **Disabled**.
16. In the **Max Message Length** box, type the maximum length of the recorded message, if you choose to record a call.
17. Select the **Destination** of the recorded call.
    An **SFTP** destination appears only if Intelligent Call Center (ICC) keycode is installed.
    SFTP destinations can be specified using Element Manager.
    When a system administrator defines an SFTP folder as a storage location on the network, these storage locations must be on an SCP server. BCM supports OpenSSH 3.7.

    Note: BCM does not support secure file transfer protocol (SFTP) as element manager (EM) screens in Silent Record a Call (SRC) and Backup Restore Utility (BRU) indicate. Instead, the

secure copy protocol (SCP) is supported. Therefore, wherever an SFTP server is required, a server supporting SCP should be setup instead. Additionally, all instances of the phrase "SFTP" in the EM should be taken to mean "SCP."

18 Click **Submit**.

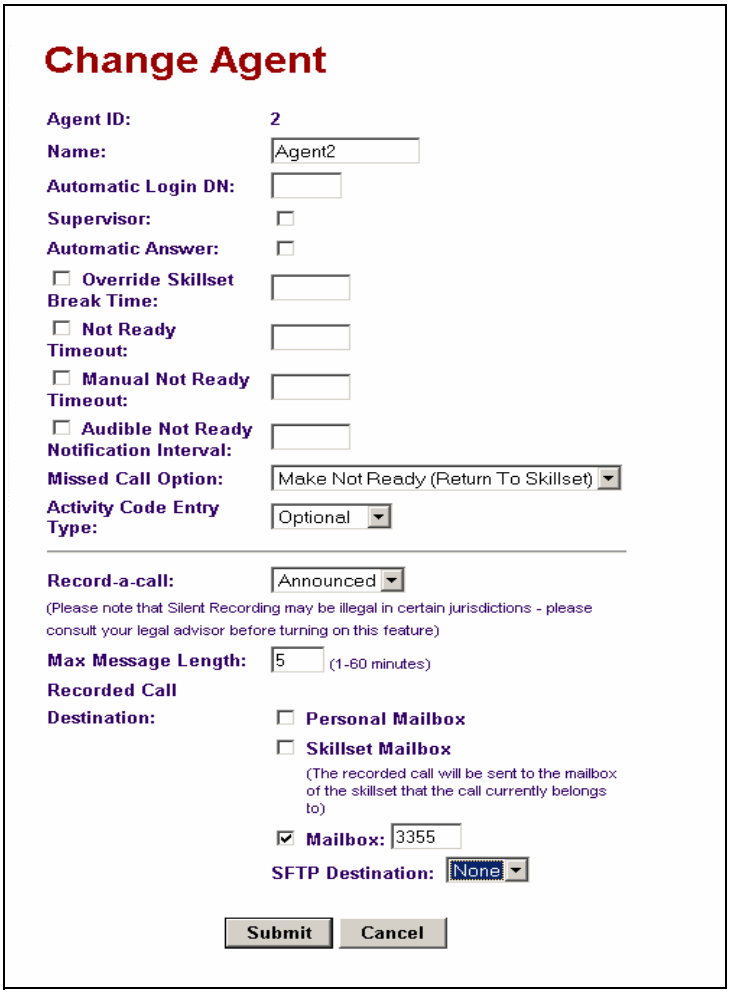
Note: Any agents who have an agent ID number that is between the numbers you enter in the From and To boxes are not changed. These agents are not included in the number of agents added.

Changing agent information

You can change an agent's

- name
- Automatic Login DN
- supervisor status
- Automatic Answer setting
- Override Skillset Break Time
- Not Ready Timeout
- Manual Not Ready Timeout
- Audible Not Ready Notification
- Missed Call Option
- Activity Code setting
- Record-a-call
- Max Message Length
- Recorded Call Destination

Note: You cannot change the properties of an agent who is logged on. Ask the agent to log off and then make the changes.



To change agent information

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Agent List** link.
   The Agent List page appears.
4. Click the **Change** link for the agent you want to change.
   The Change Agent page appears.
   If the agent if logged on, a message appears that says that the agent must log off first.
5. Change the properties that you want to change for the agent.
6. Click **Submit**.
   Repeat steps 4 and 5 for each agent you want to change.

Resetting an agent's password

If an agent forgets their password, you can reset the password back to the default value (0000). After you reset the password, the agent must change their password the next time they log on.

To reset an agent's password

1. Log on to CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Agent List** link.
   The Agent List page appears.
4. Click the **Reset Password** link for the agent whose password you want to reset.
   A message appears that asks you to confirm the request to reset the password.
5. Click **OK**.
   A message appears that the agent's password is reset. The agent password is set to 0000.
6. Click **OK**.

Deleting an agent

Deleting an agent removes the agent from Contact Center. The agent is removed from the Agent List and all the skillsets they are assigned to.

If you want to remove an agent from a skillset, see "Unassigning an agent from a skillset" on page 66.

Note: You cannot delete an agent who is logged on. Ask the agent to log off and then delete them.

To delete an agent

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Agent List** link.
   The Agent List page appears.
4. Click the **Delete** link for the agent you want to delete.
   A message appears that asks you to confirm the deletion.
   If the agent you want to delete is logged on, the Delete button is not available.
   If the agent you want to delete has logged on while you are deleting them, a message appears that says that the agent must log off before you can delete them.
5. Click **OK**.
   A message appears that says the agent is deleted.
6. Click **OK**.

Forcing an agent off

Agents usually log out when they are no longer available to receive calls. If an agent leaves and does not log off, you can force the agent off. An agent that is forced off does not receive any new Contact Center calls.

To force an agent off

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Agent List** link.
   The Agent List page appears.
4. Click the **Force Off** link for the agent you want to log off.
   A message appears that asks you to confirm the request to force off the agent.
5. Click **OK**.
   A message appears that says the agent is logged off.
6. Click **OK**.
   The agent status changes to Logged Off on the Agent List page.

Note: If the agent you force off is on a call, the call is not interrupted.

Chapter 5
Setting up skillsets

About skillsets

Contact Center skillsets answer and distribute calls to agents as they become available. Skillsets hold calls for different Contact Center departments, such as sales and technical support.

The default number of skillsets is zero. You purchase the number of skillsets you require up to a maximum of 50. For more information see "Contact Center Update" on page 15.

You cannot change the properties of a skillset while it is in use. For more information, see "Skillset properties" on page 54 and "Configuring lines" on page 162.

How incoming calls are sent to a skillset

Incoming calls are sent to a skillset in one of the following ways:

- You assign a line to be answered directly by a skillset. For information about assigning lines see "Line administration" on page 161.
- A receptionist, agent or subscriber receives a call and transfers the call to a skillset. They can transfer the call to a skillset by pressing [⇄] [7] [0] or TRANSFER and entering the CDN of the skillset. The receptionist, agent or subscriber must not use the Call Pickup feature.
- The Automated Attendant or a CCR Tree answers the call and the caller makes a selection that routes them to the CDN of the skillset. For more information, see "Auto Attendant" on page 22 and "Custom Call Routing (CCR)" on page 22.
- Calls can be forwarded to the Control Directory Number (CDN) of the skillset by Call Forward All Calls (CFAC), Call Forward No Answer (CFNA) or Call Forward On Busy (CFB). For information about these features, see the *BCM 5.0 Administration and Security Guide*.

Note: Agents are restricted in how they can use CFAC, CFNA, and CFB. For more information, see "Important considerations about how agents use features" on page 229.

Note: Contact Center does not support CFAC to an external number. If the agent configures CFAC to an external number, the calls are dropped.

Skillset properties

Skillset	The number between 1 and 50 that is assigned to the skillset. If you have a BCM50, the number between 1 and 30.
Control DN	The Control Directory Number is the extension associated with the skillset. Incoming calls transfer to the CDN of each skillset from extensions, the Automated Attendant or Custom Call Routing. The CDN is the skillset mailbox number.
Name	The skillset name is displayed: • on Contact Center displays to identify the skillset • in reports • as the skillset mailbox name The skillset name can be a maximum of 16 characters. If you do not enter a name, the skillset name defaults to *SKILLn* where *n* is the skillset number. The name for each skillset is the same as the skillset mailbox name.
MWI DN **(Message Waiting Indication extension)**	The Message Waiting Indication extension is an optional phone number that indicates that a skillset mailbox has messages waiting. The MWI extension that you assign shows *Message for you* on the telephone display when there are new messages in the skillset mailbox. The MWI DN defaults to None. If you forget the MWI extensions for a skillset mailbox, you can view the MWI extensions by using the procedure "Determining a skillset mailbox number" on page 71. Note: If you plan to use Attendant Extension, you must enter an MWI DN. You can use MWI DN without an attendant extension, but you cannot configure an attendant extension without an MWI DN. The MWI DN must be a different number than the attendant extension.
Method **(Method of Call Distribution)**	The method of call distribution determines to which of several available agents to route the call. There are two methods of call distribution: Least Busy and Preferred. Least Busy routes the call to the agent who has been available the longest. Preferred routes the call to the agent with the highest priority (best qualified agent is 1). If there are several agents with the highest priority, the agent available longest with that priority will be selected. The default method of call distribution is Least Busy. You can assign agents different priorities depending on the skillsets to which they belong. For more information, see "Dynamic Agent Priority" on page 63.
Break Time	Break Time is a time period for agents to complete paperwork after they finish a call. After an agent completes a call, they are taken out of the skillset for the Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code. For more information, see "Not Ready" on page 37. The Break Time period can last from 00:00 to 59:59. The Break Time default is 00:30 seconds. You can change the Break Time period to 00:00 if an agent does not need a Break Time. If your Contact Center uses Activity Codes, set the Break Time to longer than 10 seconds to allow time for Activity Code entry.

Delay Answer	Delay Answer is a toll-saving feature that prevents Contact Center from answering calls and playing greetings when there are no agents available. When a call comes in on a line belonging to a skillset that has no free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever happens first. During the Delay Answer time, the waiting callers hear ringback. To activate the Delay Answer feature, enter a time for Delay Answer. The Delay Answer time can be a minimum of zero seconds and a maximum of 10 minutes. The default Delay Answer time is 00:00.
Primary Alert **Secondary Alert**	Alert times are time limits for calls waiting in skillsets. You can set the alert time for all calls for each skillset. When the alert time has passed, it produces a flash on a memory button indicator. A slowly flashing indicator alerts you that a call has exceeded the Primary alert time. A quickly flashing indicator alerts you that a call has exceeded the Secondary alert time. The indicator stops flashing when the calls are handled. You assign alert times in minutes and seconds. There is no default value for alert times. Secondary alerts must be greater than primary. Agents do not have to be logged on to see the Display Waiting Calls memory button flashing. A memory button must be programmed with the Display Waiting Calls Feature Code and the Primary alert time must be set up for the memory button to show waiting calls status.
Attendant extension	The attendant extension is the extension used if a caller requests to talk to the operator after the caller transfers to the Automated Attendant or CCR. The attendant extension is optional. If you do not assign an attendant extension, the call is sent to the system attendant extension. If a call is transferred to an Auto Attendant greeting table, the call is sent to the greeting table attendant. Note: You must enter an MWI DN before you enter an attendant extension. If you enter an attendant extension without an MWI DN assigned, you receive an error message prompting you to enter the MWI DN. The attendant extension must be a different number than the MWI DN.
Prompt Language	Prompt Language can be either Primary or Alternate. The Prompt language is the language choice used for prompting callers who transfer to the Automated Attendant or CCR. Prompt Language appears only on a system that is configured as bilingual.
Use previous _ calls to calculate EWT	You can enter a number between 2 and 256 calls. For more information about Expected Wait Time see “Expected Wait Time” on page 132.
EWT Increase Allowed	Selected by default, which means that EWT will be recalculated if it increases, and the appropriate EWT greeting will be played. For more information about Expected Wait Time see “Expected Wait Time” on page 132.

Initial Call Duration	The Initial Call Duration is used to compute expected wait time until sufficient call statistics are obtained. This can be a value between 00:01:00 and 24:00:00. For more information about Expected Wait Time see "Expected Wait Time" on page 132.
Activity Code Entry Type	Activity Code entry types are Prompted and Optional. If you select Prompted, the agent is prompted to enter Activity Codes on their telephone. If you select Optional, an Activity Code session is not automatically displayed on the agent's telephone, but they can press F907 and enter Activity Codes. Optional is the default. For more information about Activity Codes see "Activity Codes" on page 187. This option appears if Reporting for Contact Center is enabled.

Setting up or changing a skillset

You can record skillset properties in the table "Contact Center skillsets" on page 237.

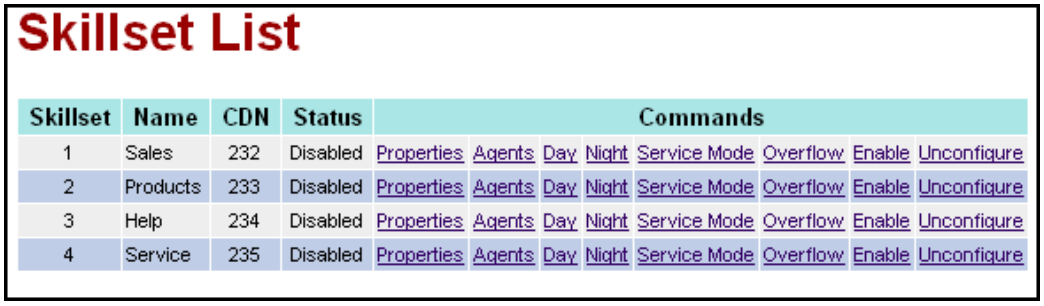
Note: Before you can change a skillset you must disable the skillset and wait until there are no calls in the skillset. You cannot change a skillset while it is in use.

To set up or change a skillset

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

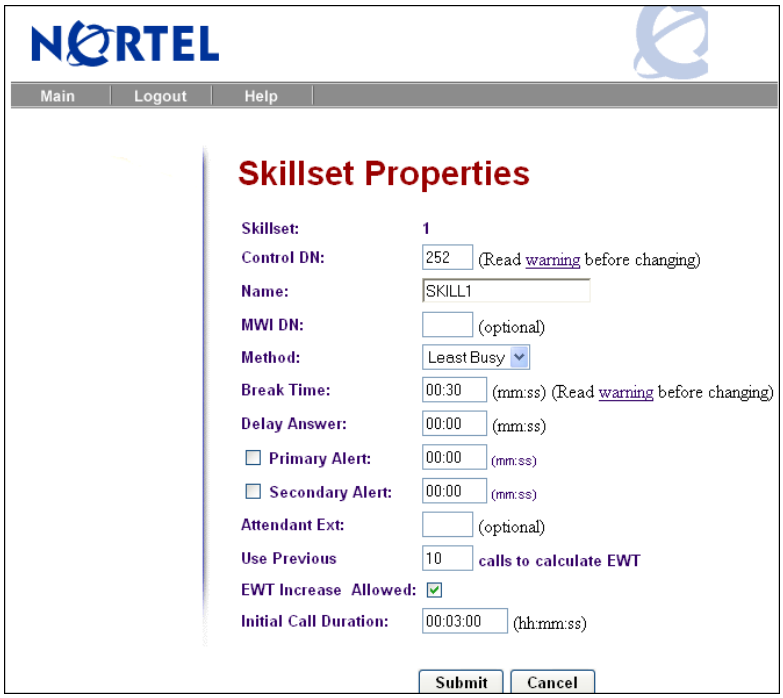


Skillset List

Skillset	Name	CDN	Status	Commands							
1	Sales	232	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
2	Products	233	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
3	Help	234	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
4	Service	235	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure

4 If you want to set up a skillset, click the **Configure** link for the skillset you want to set up or

if you want to change a skillset, click the **Properties** link for the skillset you want to change. The Skillset Properties page appears.



5 In the **Control DN** box, type the extension for the skillset.
For more information, see "Control DN" on page 54.

6 In the **Name** box type the name for this skillset. The skillset name can be a maximum of 16 characters.

7 In the **MWI DN** box, type the extension of the telephone that you want to display the Message Waiting Indicator for the Skillset Mailbox.
If you plan to use an Attendant Extension, you must enter an MWI DN.

8 From the **Method** list box, select Least Busy or Preferred.
The default is Least Busy.

9 In the **Break Time** box enter the Break Time period.
The default Break Time is 00:30.

10 In the **Delay Answer** box enter the delay answer time.
The default delay answer time is 00:00.

11 To enable the Primary Alert, select the **Primary Alert** check box and enter the Primary Alert time.

12 To enable the Secondary Alert, select the **Secondary Alert** check box and enter the Secondary Alert time. The Secondary Alert time must be greater than the Primary Alert time.

13 If you want to assign an attendant to the skillset, in the **Attendant Ext** box type the extension of the attendant.
You must enter an MWI DN before you enter an attendant extension.

14 If your system is configured for bilingual operation, from the **Prompt Language** list box, select Primary or Alternate. The Prompt Language list box does not appear if you do not use bilingual operation. For more information on bilingual operation see "Assigning the Contact Center language" on page 165.

15 If you use Expected Wait Time (EWT), enter the number of calls you want to use to calculate EWT in the **Use Previous ___ calls to calculate EWT** box. This is the number of previous calls that are used to calculate the average call duration of a skillset. The number can range from 2 to 256. The default is 10. For more information about EWT see "Expected Wait Time" on page 132.

16 If you use Expected Wait Time, leave the **EWT Increase Allowed** check box selected if you want the system to recalculate the EWT if it increases and continue to play the appropriate EWT greeting. If you clear the check box, callers will not hear recalculated expected wait times if the wait time increases. Whether you select the check box or not, callers will hear the appropriate EWT greeting if the wait time decreases.

17 If you use Expected Wait Time, in the **Initial Call Duration** box enter in hh:mm:ss format the initial average call duration that is used to compute EWT. The average call duration is updated whenever a call is released from an agent. The default is 00:03:00.

18 If you use Activity Codes, from the **Activity Code Entry Type** list box select **Prompted** or **Optional**. The default is optional. For more information about Activity Codes see "Activity Codes" on page 187.

19 Click **Submit**.
A message appears that says a new mailbox is created and that you must initialize the mailbox before you enable the skillset. For how to initialize a mailbox see, "Initializing a skillset mailbox" on page 72.

20 Click **OK**.

Setting up DID routing

You can route calls based on their Direct Inward Dialing (DID) number. DID is the ability to make a telephone call directly into an internal extension, without having to go through the operator.

To route DID calls, set up a DID target line and assign the target line to a skillset.

To set up DID routing for BCM

1 In Element Manager, set up a DID target line.
For information about setting up a DID target line on BCM, see the *BCM 5.0 Administration and Security Guide*.

2 In CallPilot Manager, configure the target line number to be answered by Contact Center.
For information about configuring lines, see "Configuring lines" on page 162.

Setting up CLID/DNIS Routing

You can set up CLID/DNIS Routing Tables. CLID/DNIS Routing is the initial routing that Contact Center calls encounter. The CLID/DNIS Routing you set up lets Contact Center route calls quickly, based on their incoming line number. Callers are routed to skillsets depending on who the caller calls, the line on which the call enters, or from where the caller calls. Your CLID/DNIS Routing Table can have a maximum of 1000 rules.

Examples of using CLID/DNIS Routing

Routing using CLID/ANI

If your company has preferred customers or customers who have access to special services, you can set up CLID/ANI routing that recognizes the phone numbers the customers are calling from. Customers whose phone numbers are recognized are immediately routed to appropriate skillsets. The callers do not need to enter additional digits to route their calls.

Routing using DNIS

If your company has a customer who is a purchasing agent who frequently contacts a sales line, you can set up DNIS routing that recognizes the phone number the customer is calling. Customers who call the sales directory numbers are immediately routed to sales skillsets.

Routing using Multimedia Contact Center

If your company has Multimedia Contact Center enabled, callers can click an HTML icon and enter the phone number they want an agent to call them at. Calls that arrive from a multimedia call are recognized as Multimedia Contact Center calls and routed to the appropriate skillsets. You can set up CLID/ANI rules for Multimedia Contact Center Calls. The phone number that the caller enters in the web browser is the phone number that Multimedia Contact Center dials when an agent receives the call.

Routing using a Line

If your company uses a rotary number without DNIS capability that uses lines 1 to 3, you can set up routing to send calls that come in on these lines to a specific skillset.

Routing using CLID and a Line

If your company uses a rotary number and subscribes to a CLID service, you can set up routing based on CLID and Line to route a special customer.

Routing using CLID/ANI and DNIS

If your company has customers who call the sales group or the service group frequently, you can set up routing based on CLID/ANI and DNIS to quickly route these customers. You can route the customers to a skillset with agents that specialize in service or sales to these customers.

CLID/DNIS Routing Table properties

Line	The line is the line number the call comes in on. Any calls that arrive on this line are assigned the routing you select. The line number you enter must be a line that is configured to be answered by a skillset.
CLID/ANI	The CLID (Calling Line Identification) or ANI (Automatic Number Identification) number identifies the caller or the location the call was made from. Any calls that have this CLID or ANI number are assigned the priority from 1-20 that you select. If a call matches the CLID/ANI information in the routing table, the call is routed to the skillset you choose. You can change the priority, from 1-20, of the call in the skillset that is assigned for the line on which the call comes in. If you select the Multimedia Calls check box, you must have a CLID/ANI entry, either a phone number or an asterisk (*). An asterisk (*) in the CLID/ANI field represents all Multimedia Contact Center calls, including browser only calls, and phone and browser calls. If you select Multimedia Calls and enter an asterisk in the CLID/ANI field, then all Multimedia Contact Center calls are routed to that specific skillset. If you want to route the phone and browser calls to another skillset, then program a CLID/ANI entry with a telephone number. This is a separate entry from browser only calls.
DNIS	DNIS (Dialed Number Identification Service) sends a call directly to an internal extension without going through the operator. A DNIS number identifies the number the call is made to. If a call matches the DNIS information in the routing table, the call is routed to the skillset you choose. You can change the priority of the call in the skillset that is assigned for the line the call comes in on.
Multimedia Calls	Select the Multimedia Calls check box if you want Multimedia Contact Center calls assigned to this route. You must have Multimedia Contact Center enabled. Incoming Multimedia Contact Center calls are assigned the Priority you select. If you select the Multimedia Calls check box, you must have a CLID/ANI entry, either a phone number or an asterisk (*). An asterisk (*) in the CLID/ANI field represents all Multimedia Contact Center calls, including browser only calls and phone and browser calls. If you select Multimedia Calls and enter an asterisk (*) in the CLID/ANI field, then all Multimedia Calls are routed to the specific skillset. If you want to route the phone and browser calls to another skillset, then program a CLID/ANI entry with a telephone number. So it is a separate entry from the browser only calls If you do not select the Multimedia Calls check box, you must enter one of CLID/ANI, DNIS, or Line number.
Action	The action is the treatment that is applied to the call: • You can move the call to another skillset • You can change the priority of the call from 1-20 • You can move the call to another skillset and change the priority of the call

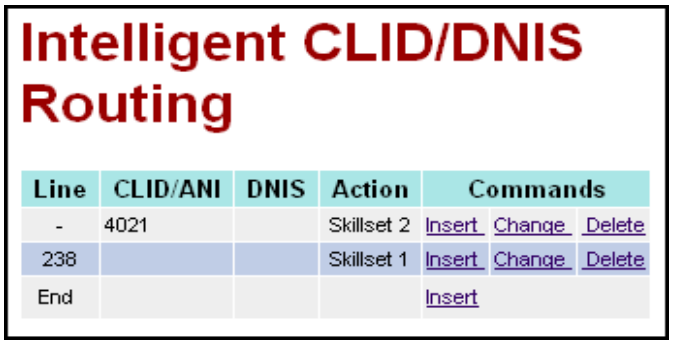
Note: The CLID routing table can support 1000 rules. Each rule can be a number, or a range, such as 416*.

To add a CLID/DNIS Route

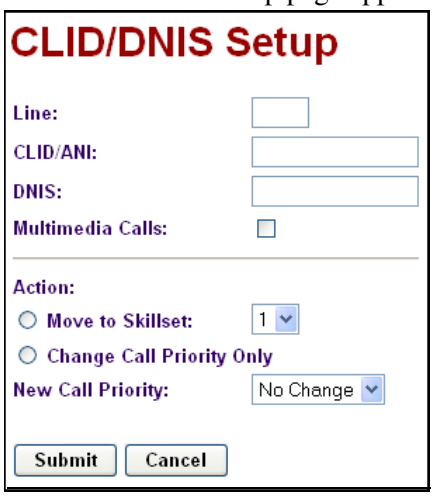
1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **CLID/DNIS Routing Table** link.
The Intelligent CLID/DNIS Routing page appears.



4 Click the **Insert** link.
The CLID/DNIS Setup page appears.



5 Set the method to identify the call:

- If you want to create a rule based on the line a call comes in on, in the **Line** box enter the line number.
- If you want to create a CLID or ANI rule, in the **CLID/ANI** box type the CLID or ANI number you want to assign this routing to. The CLID or ANI number identifies the caller or the location the call was made from.
- If you want to create a DNIS rule in the **DNIS** box type the DNIS number you want to assign to this route. The DNIS number identifies the number the call is made to.

- If you want to create a rule for CLID/ANI and a rotary number, in the **CLID/ANI** box type the CLID or ANI number and in the **Line** box type the line number
- If you want to create a rule for CLID/ANI and DNIS, in the **CLID/ANI** box type the CLID or ANI number and in the **DNIS** box type the DNIS number
- If you have Multimedia Contact Center enabled and you want to assign routing to Multimedia Contact Center calls, select the **Multimedia Calls** check box. If you select the Multimedia Calls check box, you must enter a CLID/ANI number or an asterisk.
  If you do not select the Multimedia Calls check box, you must enter either a Line, CLID/ANI, or DNIS number.

6 Select the type of routing you want to apply to the call:

- if you want to move the call to another skillset, select **Move to Skillset** and from the **Skillset** list box select the number of the skillset you want to route the call to
- if you want to move the call to another skillset and assign it a different priority:
  — select **Move to Skillset**
  — from the **Skillset** list box select the number of the skillset you want to route the call to
  — from the **New Call Priority** list box select a priority from 1-20 for the call
- if you want to change the priority of the call, select **Change Call Priority Only** and from the **New Call Priority** list box select a priority from 1-20 for the call

7 Click **Submit**.

Changing a CLID/DNIS Route

You can change the type of routing that applies to a CLID/DNIS call. If you want to change the type of call the routing applies to, you must create a new route in the CLID/DNIS Routing Table.

To change a CLID/DNIS Route

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **CLID/DNIS Routing Table** link.
The Intelligent CLID/DNIS Routing page appears.

4 Click the **Change** link for the route you want to change.
The CLID/DNIS Setup page appears for the route.

5 Select the type of routing you want to apply to the call:

- If you want to move the call to another skillset, select **Move to Skillset** and from the **Skillset** list box select the number of the skillset you want to route the call to.
- If you want to move the call to another skillset and assign it a different priority:
  — Select **Move to Skillset**.
  — From the **Skillset** list box select the number of the skillset you want to route the call to.
  — From the **New Call Priority** list box select a priority from 1-20 for the call.

- If you want to change the priority of the call, select **Change Call Priority Only**, and from the **New Call Priority** list box select a priority from 1-20 for the call.

6 Click **Submit**.

To delete a CLID/DNIS Route

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **CLID/DNIS Routing Table** link.
The Intelligent CLID/DNIS Routing page appears.

4 Click the **Delete** link for the route you want to delete.
The routing is removed from the CLID/DNIS Routing Table.

Assigning an agent to a skillset

You can assign an agent to one or more skillsets. Each agent is responsible for answering calls for the skillsets they are assigned to.

Note: Before you can add an agent to a skillset, the skillset must be disabled. For how to disable a skillset see "Disabling a skillset" on page 67.

Dynamic Agent Priority

Agents can have different priorities depending on the skillset to which they are logged on. For example, when an agent is a member of the English skillset, their priority can be 1 because they are fluent in English. The same agent can have a priority of 3 when they are logged on to the Spanish skillset, and a priority of 6 when they are logged on to the German skillset.

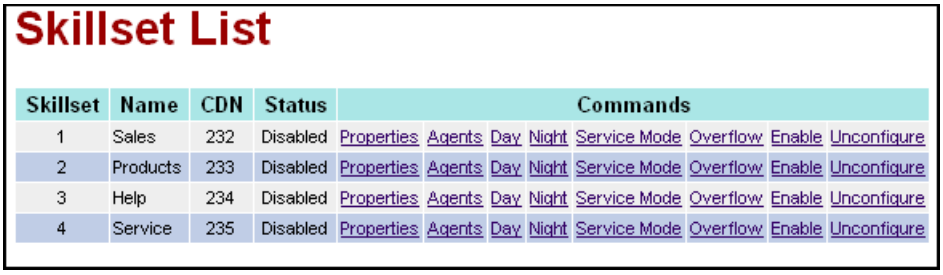
If the method of call distribution for the skillset is Preferred, the agent with the highest priority receives the call. The agent priority ranges from 1 to 20. 1 is the highest agent priority for the most qualified agents. The default value is 10. For more information about method of call distribution, see "Method" on page 54.

To assign an agent to a skillset

1 Start CallPilot Manager.

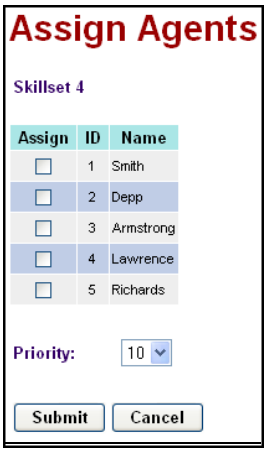
2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.



4 Click the **Agents** link for the skillset that you want to add agents to.
The skillset must be configured before the Agents link appears.
The Assigned Agents page appears.

5 Click **Assign**.
The Assign Agents page appears with the available agents displayed.



6 Click the **Assign** check box for each agent that you want to add to the skillset.

7 From the **Priority** list box, select the Priority of the agent.
1 is the highest priority.

8 Click **Submit**.
The agent you selected appears on to the Assigned Agents page.
If you want to assign another agent to this skillset, follow steps 5 through 8.

9 Click **Close** to return to the Skillset List page.

Changing an agent's priority in a skillset

Agents can have different priorities depending on the skillset to which they are logged on. For example, when an agent is a member of the English skillset, their priority can be 1, because they are fluent in English. The same agent can have a priority of 3 when they are logged on to the Spanish skillset and, a priority of 6 when they are logged on to the German skillset.

Before you can change an agent's priority:

- Disable the skillset. See "Disabling a skillset" on page 67.
- Log off the agent. See "Forcing an agent off" on page 51.

To change an agent's priority in a skillset

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Agents** link for the skillset you want to change the agent priority of.
   The Assigned Agents page appears.
5. Click **Change**.
   The Change Agent Priorities page appears.
6. Click the **Change** check box for the agent whose priority you want to change.
   You can select more than one agent if you want to assign them the same priority.
7. From the **Priority** list box select the priority you want to assign.
8. Click **Submit.**
   The Assigned Agents page shows the new priority.
   Repeat steps 5 through 8 for each agent you want to change.

Or

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Agents** link for the skillset you want to change the agent priority of.
   The Assigned Agents page appears.
5. Click the **Change** link beside the agent's name whose priority you want to change.
   The Change Agent Priority page appears.
6. From the **Priority** list box select the priority you want to assign.
7. Click Submit.
   The Assigned Agents page shows the new priority.

Unassigning an agent from a skillset

When you unassign an agent from a skillset, the agent is removed from the skillset but is not deleted from Contact Center.

Before you unassign an agent from a skillset, you must disable the skillset. See "Disabling a skillset" on page 67.

If you want to delete an agent from Contact Center, see "Deleting an agent" on page 50.
If you want to log an agent off, see "Forcing an agent off" on page 51.

To unassign an agent from a skillset

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Agents** link for the skillset you want to unassign an agent from.
   The Assigned Agents page appears.
5. Click the **Unassign** link for the agent you want to remove.
   A message appears that asks you to confirm your request to unassign the agent.

   Note: If the agent you are unassigning is logged on, a message appears that says the agent is logged on and asks you to force the agent off or ask them to log off.

   To unassign the agent, Click **OK**.

6. Click **OK**.
   The agent is removed from the Assigned Agents page.
7. Click **Close** to return to the Skillset List page.

Viewing agents in a skillset

To view agents in a skillset

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Agents** link for the skillset you want to view.
   The agents who are assigned to the skillset appear on the Assigned Agents page.

5 Click **Close** to return to the Skillset List page.

Note: For information about monitoring agents and skillsets, see "Monitoring Contact Center call activity" on page 173.

Enabling a skillset

After you set up a skillset, the skillset is disabled until you enable it.

Before you can enable a skillset you must:

- Set up the skillset with a valid Control DN.
  For information, see "Setting up or changing a skillset" on page 56.
- Initialize the skillset mailbox.
  For information, see "Initializing a skillset mailbox" on page 72.
- Record skillset mailbox greetings.
  For information, see "Recording skillset mailbox greetings" on page 77.
- Set up the Day and Night Routing Tables.
  For information, see "Example of a Day Routing Table" on page 148.

To enable a skillset

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Enable** link for the skillset to you want to enable.
On the Skillset List page in the Status column the skillset changes from Disabled to Enabled.
A message appears that says what Service Mode the skillset is in.

Note: To change the Service Mode of a skillset, see "Setting the Service Mode for skillsets" on page 146.

Disabling a skillset

You must disable a skillset if you want to change the skillset properties or administer the lines.

If you disable a skillset, no new calls go to the skillset. Any calls that are in the skillset get distributed until the calls are ended.

To disable a skillset

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Disable** link for the skillset you want to disable.
A message appears that asks you to confirm the request to disable the skillset.

5 Click **OK**.
On the Skillset List page in the Status column the skillset changes from Enabled to Disabled.

Unconfiguring a skillset

You must disable a skillset if you want to change the skillset properties or administer the lines. Before you unconfigure a skillset:

1 Disable the skillset by following the procedure "Disabling a skillset" on page 67.

2 Unassign any lines that are assigned to it by following the procedure "Configuring lines" on page 162.

Warning: If you unconfigure a skillset, you delete the skillset properties and the programming for the skillset. The skillset properties deleted include the assigned agents, day and night routing tables, service mode, overflow table and skillset mailbox.

To unconfigure a skillset

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Unconfigure** link for the skillset you want to unconfigure.
A message appears that asks you to confirm the request to unconfigure the skillset.

5 Click **OK**.
The programming for the skillset is removed from the Skillset List page.

Automatic login

Automatic login is designed for survivability in the event of a system reboot during the business day. With automatic login, you can configure agents to be automatically logged back in to Contact Center if there is a system reboot during the business day. Agents, who are configured to be automatically logged in, are logged back in to Contact Center when it restarts provided that the configured DN is available.

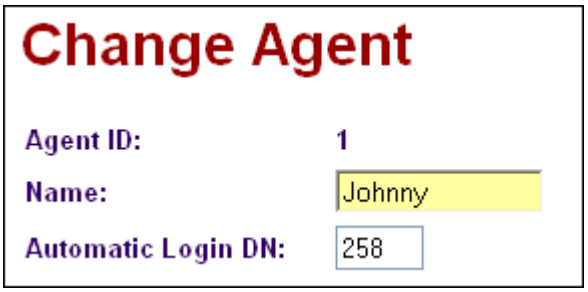
If the DN is not available, then the agent is not logged in automatically until Contact Center is restarted and the DN is available. The agent can be logged in manually to another DN or the same DN if the configured DN was not available at start-up. The agent can also be manually logged out of a DN and logged into an alternate DN or the same DN.

Note: Automatic login does not automatically log in agents after you configure it. You must restart voicemail or reboot the BCM to enable automatic login.

You can restart voicemail through Element Manager. Navigate to the Administration panel > General > Service Manager > voicemail and choose Restart. This impacts voicemail functionality and a warning message appears.

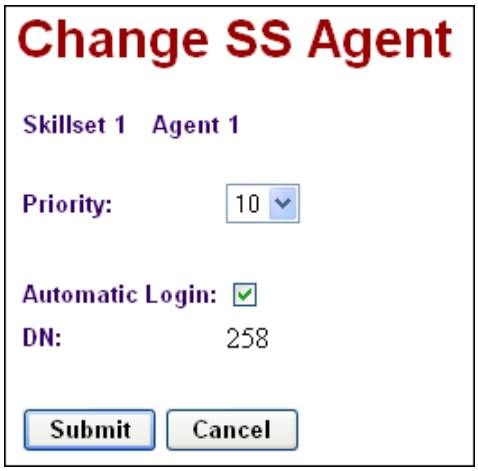
Configuring automatic log in

1. From the Contact Center menu, select the **Agent List** link.
   The Agent List page appears.
2. From the Agent list, select an agent and click **Change**.
   The agent's properties page appears.



3. In the **Automatic Login DN** box, enter the DN to which the agent is automatically logged in.
4. Click **Submit.**
5. From the Contact Center menu, select the **Skillset List** link.
   The Skillset List page appears.
6. From the Skillset List, select the skillset to which the agent is assigned and click **Agents**.
   The Assigned Agents page appears.

7 Select the agent and click **Change**.
The Change SS Agent page appears.



8 Select the **Automatic Login** check box.

9 Click **Submit**.

Chapter 6
Setting up skillset mailboxes

About skillset mailboxes

Each skillset has a mailbox that stores messages left by callers. A skillset mailbox is created automatically when you set up a skillset. There is one skillset mailbox for each skillset. The skillset mailbox number is the same as the Control Directory Number (CDN) of the skillset.

Skillset mailboxes have these Class of Service settings:

- they use the primary prompt language
- their maximum message time is 15 minutes
- their maximum message length is three minutes
- their maximum message retention is 30 days
- they have a maximum greeting length of one minute

The default Class of Service for skillset mailboxes is 1.

To prepare a skillset mailbox to receive messages:

- know the skillset mailbox number (CDN) of each skillset mailbox.
  If you do not know the skillset mailbox number, see "Determining a skillset mailbox number" on page 71
- initialize the skillset mailbox
- record the skillset mailbox greetings

You can use the table "Skillset mailboxes" on page 242 to record the skillset mailboxes you set up.

Determining a skillset mailbox number

You must know a skillset mailbox number before you can set up the skillset mailbox. The skillset mailbox number is the mailbox's Control DN. If you know the skillset mailbox number, you can initialize the mailbox. Refer to "Initializing a skillset mailbox" on page 72.

To determine a skillset's mailbox number and Message Waiting Indication telephone

1 Press [e] [9] [8] [5].

VM: xxxx
NEXT

2 The skillset mailbox number for skillset 1 is displayed.
If None appears the skillset is not configured.
Press NEXT to continue.

MeetMe: xxxx
NEXT

3 Press NEXT

CDN 1:xxxx
NEXT

4 Press NEXT

CDN 2:xxxx
NEXT

5 Press NEXT

Ext 1: xxx
NEXT

6 The Message Waiting Indication (MWI) extension is displayed.
If there are messages in the skillset 1 mailbox, MWI appears at this extension. You assign the MWI extension when you set up the skillset. If Unavail appears you have not set up an MWI extension.

7 Press next to view the skillset mailbox number and MWI extension for each skillset.

8 Press [☎] to end the session.

Initializing a skillset mailbox

You must initialize a skillset mailbox before you can retrieve or listen to messages that are left in it.

Choose a password for the skillset mailbox that is between four to eight digits long and does not start with zero. Give the skillset mailbox passwords to the agents who are responsible for retrieving messages.

Initializing a skillset mailbox involves:

- choosing a password from four to eight digits long that does not start with zero
- changing the skillset mailbox default password to the new password
- recording the skillset mailbox name in the Company Directory

To initialize a skillset mailbox

1 Press [✆] [9] [8] [1].

2 Log on by following the voice prompts.
Use the skillset mailbox number and [0] [0] [0] [0], the default password.

```
Must change pswd
```

3 This display appears briefly to indicate that you must change the password.

```
Pswd:
RETRY          OK
```

4 Enter a new skillset mailbox password from four to eight digits long that does not start with zero.
Press OK or [#].

```
Again:
RETRY          OK
```

5 Reenter the skillset mailbox password and press OK or [#].

```
Record name:
RETRY          OK
```

6 At the tone, record the skillset mailbox name in the Company Directory. Do not use handsfree.
Include the skillset mailbox number in the recording, For example, “Sales, mailbox 5813.”
Press OK or [#] to end the recording.

```
Accept name?
RETRY    PLAY    OK
```

7 Press OK or [#] to accept the recording
or
press PLAY or [1] to listen to the recording
or
press RETRY or [2] to re-record your name.

```
<Skillset name>
```

8 The recorded name plays and the skillset mailbox name is displayed. The skillset mailbox name is the name you entered when you set up the skillset properties.

9 Press [☎] to end the session.

Opening a skillset mailbox

You can open an initialized skillset mailbox from:

- your extension
- another extension
- an outside tone dial telephone

To open a skillset mailbox - Norstar Voice Mail

1 Press [ ] [9] [8] [1].

```
Pswd:
OTHR    RETRY    OK
```

2 Enter the skillset mailbox password and press OK or [#]
or
if you are at another extension, or if you are using a Guest mailbox, press OTHR or [*] to display the Log: prompt. When this prompt appears, enter the skillset mailbox number and
password.

```
1 new 1 saved
PLAY    REC    ADMIN
```

3 After you open the skillset mailbox, the telephone display shows how many new and saved messages are in the mailbox.

To open a skillset mailbox - CallPilot

1 Press [ ] [9] [8] [1].

```
Mbox:
RETRY            OK
```

2 Press [#]
or
if you are at another extension, enter the skillset mailbox number and then press OK or [#].

```
Pswd:
RETRY            OK
```

3 Enter the skillset mailbox password and press OK or [#].

Opening a skillset mailbox remotely

To open a skillset mailbox from an outside telephone

- If a skillset mailbox is a Mailbox node in a CCR Tree, press the one digit number and you automatically transfer to the skillset mailbox

  or

- Call an Operator, receptionist or subscriber and ask them to transfer you to the skillset mailbox number using [e] [9] [8] [6]
- After you reach the skillset mailbox, press [*] [*] during the greeting to open the skillset mailbox. If you are in Europe or Australia press [8] [8].
- At the voice prompt, enter the skillset mailbox number and password and press [#]. Follow the voice prompts.

To open a skillset mailbox directly from an outside telephone

Follow either procedure to open a skillset mailbox remotely.

1. Call a telephone line that is answered by the Automated Attendant.
2. Press [*] [*] during the Automated Attendant Menu prompt.
   If you are in Europe or Australia press [8] [8].
3. Enter the skillset mailbox number and password, and then press [#].
4. Follow the voice prompts.

or

1. Call your own extension number.
2. Press [*] [*] during your personal greeting.
   If you are in Europe or Australia press [8] [8].
3. Enter the skillset mailbox number and password, and then press [#].
4. Follow the voice prompts.

Skillset mailbox password

To decrease the chances of unauthorized access to a skillset mailbox, change its password every 30 days.

Keep a written copy of the skillset mailbox passwords in "Skillset mailboxes" on page 242. Give the skillset mailbox passwords only to the agents who retrieve messages at your Contact Center. For security reasons, choose an uncommon password, not a predictable password like 1234 or 1111. If someone knows a skillset mailbox password, they can access the skillset mailbox and play or delete messages. They can also access CallPilot and use it fraudulently or disrupt service.

Changing a skillset mailbox password

You can change a skillset mailbox password at any time. A password must be from four to eight digits long and cannot start with zero.

To change a skillset mailbox password

1 Press [⚙] [9] [8] [1].
Follow the voice prompts or the display buttons to open the skillset mailbox.

```
<Skillset name>
```

2 The skillset mailbox name appears briefly and the recorded name plays.

3 If you use the CallPilot interface:

- Press [8] [4] to open the Mailbox Password menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press PSWD or [4]
- Go to step 4

```
Pswd:
RETRY    OK
```

4 Enter your new mailbox password and press OK or [#].

```
Again:
RETRY    OK
```

5 Re-enter your new mailbox password and press OK or [#].

```
Password OK
```

6 This display appears briefly.

7 Press [☎] to end the session.

Resetting a skillset mailbox password

Note: Reset a password only if the agent who accesses the skillset mailbox forgets the password or is “locked-out”. The password for the reset mailbox is 0000. The agent who accesses the skillset mailbox cannot retrieve skillset mailbox messages until they create a new password. Tell the agent to change the default password as soon as possible. While the skillset mailbox has the default password, the mailbox is vulnerable to unauthorized access.

To reset a skillset mailbox password

1 Start CallPilot Manager.

2 Click the **Mailbox Administration** heading.
The Mailbox List page appears.

3 Click the **Reset Password** link for the skillset mailbox you want to reset the password for.
A message appears that asks you to confirm your request to change the password.

4 Click **OK**.
The password is reset to 0000, the default password.

Recording skillset mailbox greetings

After you initialize a skillset mailbox, record the greetings for it.

You can record Primary, Alternate and Personalized greetings for each skillset mailbox. You record a Primary skillset mailbox greeting for everyday use. The Alternate skillset mailbox greeting is an optional greeting you can record for special circumstances. If your Contact Center subscribes to Caller ID, you can record Personalized skillset mailbox greetings.

If you record Primary and Alternate skillset mailbox greetings, you must choose which greeting plays to callers who reach the skillset mailbox.

You can also record greetings in an Alternate Language. Callers can press 9 while the greeting is playing to listen to the voice prompts in the Alternate Language. Remember to inform callers in the Primary skillset mailbox greeting that they can press 9 to hear the Alternate Language.

The skillset mailbox must use the Norstar Voicemail interface for callers to be able to press 9 to hear the Alternate language. Callers cannot select an alternate language if the skillset mailbox uses the CallPilot interface.

If the Operator Status is set to Yes, and a caller presses 0 during the skillset mailbox greeting, the caller transfers to the receptionist or Operator. For information about Operator Status, see the *CallPilot Manager Set Up and Operation Guide (NN40090-300).* Inform callers in the skillset mailbox greetings that they can press 0 to speak to the receptionist or Operator.

If the Operator Status is set to No, a caller who presses 0 during the skillset mailbox greeting is informed the Operator is not available, and is transferred to the skillset mailbox.

Examples of Primary and Alternate greetings

You must record a Primary greeting for each skillset mailbox. In the Primary greeting include the skillset mailbox name that is listed in the Company Directory. For example:

"*Hello. You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your name, phone number and a brief message. One of our agents will return your call as soon as possible. Thank you.*"

You can record an Alternate greeting for each skillset mailbox. Use an Alternate greeting for special circumstances. In the Alternate skillset mailbox greeting include the skillset mailbox name that is listed in the Company Directory.

For example:

"*Season's Greetings! You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your name, phone number and a brief message. One of our agents will return your call when we re-open on December 27. Thank you.*"

To record a Primary or Alternate skillset mailbox greeting

1 Press [⚙] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

```
<Skillset name>
```

2 The skillset mailbox name appears briefly.

3 If you use the CallPilot interface:

- Press [8] [2] to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press GREET or [2]
- Go to step 4

```
Greeting options
REC   CHOOSE   CFWD
```

4 Press REC or [1].

```
Greeting:
PRIME   ALT   PERS
```

5 Press PRIME or [1] to record the Primary greeting
or
press ALT or [2] to record the Alternate greeting.
If you are changing a greeting, the current greeting starts to play.

```
Not recorded
```

6 If this is the first time you are recording a greeting, this display appears briefly.

```
Record now?
YES     NO     QUIT
```

7 Press YES or [1] and record your greeting at the tone.

```
Record greeting:
RETRY          OK
```

8 Press OK or [#] to end the recording.

```
Accept greeting?
RETRY   PLAY   OK
```

9 Press OK or [#] to accept the recording
or
press PLAY or [1] to listen to the greeting
or
press RETRY or [2] to rerecord the greeting.

10 Press [☎] to end the session.

Choosing a Primary or Alternate skillset mailbox greeting

If you record a Primary and an Alternate skillset mailbox greeting, you must choose which greeting plays. You can change the selection at any time and as often as needed. If you do not choose a greeting, the Primary skillset mailbox greeting plays.

If you choose the Alternate mailbox greeting, you must set whether the mailbox accepts messages. If you choose Yes the skillset mailbox receives messages in the normal way.

If you choose No:

- messages cannot be left in the skillset mailbox
- the Alternate mailbox greeting takes precedence over all other greetings
- if a caller presses a to fast forward the message, they hear a voice prompt that says this is a special greeting
- if a caller presses a to send a fax, the fax goes to the General Delivery Mailbox, not the skillset mailbox.

If you choose the Alternate mailbox greeting, remember to change back to the Primary mailbox greeting at the appropriate time.

To choose a Primary or Alternate skillset mailbox greeting

1 Press [ ] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

```
<Skillset name>
```

2 The skillset mailbox name appears briefly.

3 If you use the CallPilot interface:

- Press [8] [2] to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press GREET or [2]
- Go to step 4

```
Greeting options
REC    CHOOSE   CFWD
```

4 Press CHOOSE or [2] to select a greeting.

```
Use greeting:
PRIME   ALT    QUIT
```

5 Press PRIME or [1] to select the Primary mailbox greeting
and
go to step 7
or
press ALT or [2] to select the Alternate mailbox greeting
and
go to step 6.

```
Accept msgs:Y
CHNG            OK
```

6 If you choose the Alternate mailbox greeting, you are asked whether the mailbox can accept messages.
Press CHNG or [1] to toggle from yes to no
or
press OK or [#] to accept.

7 Press [ ] to end the session.

Recording a Personalized skillset mailbox greeting

If your Contact Center subscribes to Caller ID, you can record a maximum of three Personalized greetings for each skillset mailbox. For Personalized skillset mailbox greetings, you program Contact Center to recognize a specific telephone number. The Personalized skillset mailbox greeting plays only for a call from the specific telephone number.

If you record a Personalized greeting, program the skillset mailbox to receive messages and choose an Alternate mailbox greeting, the Personalized greeting takes precedence over any other greetings. If you program the skillset mailbox not to receive messages and choose an Alternate mailbox greeting, the Alternate mailbox greeting takes precedence over any other greeting, including Personalized mailbox greetings.

In the Personalized skillset mailbox greeting include the skillset mailbox name that is listed in the Company Directory. For example:

"*Hi John. You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your order. One of our agents will return your call if you need to speak to someone directly. Thank you.*"

To record a Personalized skillset mailbox greeting

1 Press [⚙] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone, to open the skillset mailbox.

```
<Skillset name>
```

2 The skillset mailbox name appears briefly.

3 If you use the CallPilot interface:

- Press [8] [2] to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press GREET or [2]
- Go to step 4

```
Greeting options
REC   CHOOSE  CFWD
```

4 Press REC or [1].

```
Greeting:
PRIME   ALT    PERS
```

5 Press PERS or [3] to record a Personalized greeting.

```
Greeting:
RETRY          OK
```

6 Enter a Personalized greeting number of 1, 2 or 3.

```
Ph:
CHNG           OK
```

7 Press CHNG or [1].

```
Ph:
RETRY          OK
```

8 Enter the phone number (maximum 10 digits) that you are assigning the Personalized mailbox greeting to.
Press OK or [#] to accept the phone number.

```
Record greeting:
RETRY          OK
```

9 Lift your handset.
At the tone, record your greeting.
Press OK or [#] to end the recording.

```
Accept greeting?
RETRY    PLAY    OK
```

10 Press OK or [#] to accept the greeting,
or
press PLAY or [1] to listen to the greeting
or
press RETRY or [2] to re-record the greeting.

11 Press [☎] to end the session.

Deleting a Personalized skillset mailbox greeting

If you no longer need a Personalized mailbox greeting, you can delete it.

To delete a Personalized mailbox greeting

1 Press [ ] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone, to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [2] to open the Greetings Options menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press GREET or [2]
- Go to step 3

```
Greeting options
REC   CHOOSE   CFWD
```

3 Press REC or [1].

```
Greeting:
PRIME   ALT   PERS
```

4 Press PERS or [3] to choose a Personalized mailbox greeting.

```
Greeting:
RETRY          OK
```

5 Enter the Personalized greeting number (1, 2, or 3) that you want to delete.

```
Ph:XXXXXXX
CHNG  DEL      OK
```

6 Press DEL or [2] to delete the greeting.

7 Press [ ] to end the session.

Checking skillset mailboxes for messages

Frequently check the skillset mailboxes for messages. Only one agent can retrieve messages from each skillset mailbox at a time.

If different agents access the messages in the skillset mailbox throughout the day, each agent should:

- listen to the message
- write down what the message says
- erase the message
- return the caller's telephone call

If the caller is not available, the agent can try again later or pass the message on to another agent.

If the agent who listens to the message erases the message after writing down what it says:

- the next agent does not waste time listening to the same message

- the next agent knows if the callback was successful or not
- only one agent contacts the caller

If only one agent is responsible for retrieving messages at your contact center, this agent does not need to transcribe and delete each message before callback. This agent handles messages and knows the status of the old messages.

Playing skillset mailbox messages

Use the procedure for playing messages that corresponds to the interface you use:

- "To play skillset mailbox messages - Norstar Voice Mail" on page 84
- "To play skillset mailbox messages - CallPilot" on page 86

To play skillset mailbox messages - Norstar Voice Mail

Use this procedure if you use the Norstar Voice Mail interface.

1 Press [ ] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

```
2 new 0 saved
PLAY   REC    ADMIN
```

2 Press PLAY or [2] to listen to your messages.
For other options, see the table "Playing skillset mailbox messages - Norstar Voice Mail" on page 84.

3 Press [ ] to end the session.

The table "Playing skillset mailbox messages - Norstar Voice Mail" shows the message options available to you during and after playing messages.

Playing skillset mailbox messages - Norstar Voice Mail				
Option		**Available while playing**	**Available after playing**	**Description**
Back up	[1] or <<	✓		Rewinds the message nine seconds and resumes playing it.
Copy	[5] or COPY	✓	✓	Sends a copy of the message to one or more mailboxes. If you record an introduction, it must be longer than three seconds.
End of Message	[3] [3] or >>> >>>	✓		Goes to the end of the message.

Playing skillset mailbox messages - Norstar Voice Mail				
Option		**Available while playing**	**Available after playing**	**Description**
Envelope	7	✓	✓	Plays the information in the message envelope. Envelope information includes the date and time the message was sent and, if the message is internal, the directory name of the sender.
Erase	8 or ERASE	✓	✓	Deletes the message currently playing. If no messages are playing, deletes the last message played. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes 1 and 2 on page 86.)
Forward	3 or > >>	✓		Advances the message nine seconds and continues playing from that point. A message can be forwarded as many times as required.
Next	6 or # #	✓	✓	Plays the next message in the skillset mailbox. If you use this while a message is playing, it stops playing the current message and plays the next message in the skillset mailbox.
Pause/ Continue	2 or STOP/ PLAY	✓		Temporarily stops a message. When you stop the message, you can play the previous message, continue playing the current message, or skip to the next message.
Previous	4	✓	✓	Stops playing the current message and plays the previous message.
Quit	*		✓	Stops playing the message and plays the Mailbox main menu options.
Replay	1 1 or < << < <<	✓		Replays the message from the beginning.
Replay	1		✓	Replays the last message.
Reply	9 or REPLY	✓	✓	Replies to a message. (Refer to Note 3 on page 86) The reply can be either: - a message to an internal sender's mailbox - a telephone call to an internal or external party (Refer to Note 4 on page 86.)
Save Message	7 7 or SAVE	✓		Saves the message being played. (If you do not delete a message, it is automatically saved). This option is not shown on the display unless you erase a message. If you erase a message and play the message again, you can press SAVE on a two-line display telephone. (Refer to Note 2 on page 86.)
Volume Control	*	✓		Adjusts the volume of the message that is playing. The volume increases each time you press *. After four presses, the volume returns to the lowest level.

Notes:

1 Because the skillset mailbox has limited message storage space, delete any messages you no longer need. After a certain time period, your saved messages are erased automatically. Ask your System Administrator about this.

2 You can retrieve a deleted message only if you have not quit the session in which you deleted it. For information about retrieving deleted messages, see "Retrieving erased messages" on page 87".

3 Applies only if the Reply feature is enabled.

4 You can reply to an outside caller by dialing them back if your company subscribes to service. For further information about replying to an outside caller, see "Replying to an external caller" on page 89.

To play skillset mailbox messages - CallPilot

Use this procedure if you use the CallPilot interface.

1 Press [ ] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

A voice prompt announces the number of new and saved messages that you have.

```
No messages
COMP    MBOX    EXIT
```

2 You can play any message that you want to listen to.
Press [2] to play the current message.
For other message commands, see the table "Playing skillset mailbox messages - CallPilot".

3 Press [ ] to end the session.

The table "Playing skillset mailbox messages - CallPilot" shows the message options that are available to you during and after playing messages.

Playing skillset mailbox messages - CallPilot			
Option		**Available during and after playing**	**Description**
Skip Back	[1]		Rewinds the message five seconds and resumes playing it at that point.
Skip Forward	[3]		Advances the message five seconds and continues playing from that point.
Previous Message	[4]		Stops playing the current message and plays the previous message.

Playing skillset mailbox messages - CallPilot			
Option		**Available during and after playing**	**Description**
Next Message	6		Plays the next message in the skillset mailbox. If you use this while a message is playing, it stops playing the current message and plays the next message in the skillset mailbox.
Call Sender	9		Places a call to the sender of a message.
Help	*	✓	Offers a Help menu.
Reply	7 1	✓	Replies to a message.
Envelope	7 2	✓	Plays the information in the message envelope. Envelope information includes the date and time the message was sent and, if the message is internal, the directory name of the sender.
Forward Message	7 3	✓	Forwards the message to one or more mailboxes. You can record an introduction to the forwarded message.
Reply All	7 4	✓	Replies to a message and all recipients of the message. (Refer to Note 3 on page 86.)
Delete	7 6	✓	Deletes the current message. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes1 and 2 on page 86.)

Retrieving erased messages

After you play your messages and end your skillset mailbox session, any messages that you do not erase are saved. Since message storage space is limited, we recommend that you erase messages that are no longer needed.

You can retrieve an erased message if you are still in the skillset mailbox session. An erased message remains in the skillset mailbox until you end the current session.

To retrieve an erased message - Norstar Voice Mail

After you erase a new or saved message, the number of new or saved messages shown on the display is decreased by one. Even though the display shows 0 new 0 saved, you can still play and retrieve any erased skillset mailbox messages. Press PLAY or 2 to listen to the erased message.

To retrieve an erased message - CallPilot

You can retrieve a deleted message. A deleted message remains in the skillset mailbox until you end the current session. Locate the deleted message. Then press 7 6 to restore the message.

After you play the erased message, you can restore it. If you end the current session without restoring the erased message, it is permanently erased from the skillset mailbox.

Replying to messages

You can reply to internal and external callers. You can reply to an external caller if your company subscribes to.

The messages you record must be longer than three seconds. The system times out after five seconds of silence.

Use the procedure for replying to messages that applies to the interface you use:

- "To reply to an internal caller - Norstar Voice Mail" on page 89
- "To reply to an internal caller - CallPilot" on page 89

Replying to an internal caller

If you use	and you want to	use
Norstar Voice Mail	reply to the caller's extension	CALL to transfer to the internal caller's extension.
	leave a message in the caller's mailbox	MSG to record and send a reply to the internal caller's mailbox.
CallPilot	reply to the caller's extension	Call Sender 9 to transfer to the internal caller's extension.
	leave a message in the caller's mailbox	Reply 7 1 to record and send a reply to the internal caller's mailbox.

To reply to an internal caller - Norstar Voice Mail

1 Press [e] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

```
1 new  0 saved
PLAY   REC   ADMIN
```

2 Press PLAY or [2].

```
End of message
REPLY  ERASE  NEXT
```

3 After you listen to the message, press REPLY or [9].

```
Reply to msg
MSG    CALL   QUIT
```

4 Press CALL or [2] to call the caller
or
press MSG or [1] to record and send a reply.

To reply to an internal caller - CallPilot

1 Press [e] [9] [8] [1]
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

2 A mailbox summary is announced.
While you are in your message list, you can play any message.

3 Press [2] to play the current message.

4 Press [9] to call the caller
or
press [7] [1] to record and send a reply.

Replying to an external caller

You can reply to an external caller if your company subscribes to a Caller ID service and the skillset mailbox has an outdial method assigned to it. For information about outdial method, see "Assigning an outdial method to a skillset mailbox" on page 92. Before you use the Reply option you must play the message.

Use the procedure that applies to the interface you use.

To reply to an external caller - Norstar Voice Mail

1 Press [ ] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

```
1 new  0 saved
PLAY   REC   ADMIN
```

2 Press PLAY or [2].

```
End of message
REPLY  ERASE  NEXT
```

3 After you listen to the message, press REPLY or [9].
CallPilot dials the external number directly.

To reply to an external caller - CallPilot

1 Press [ ] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 A mailbox summary is announced.
While you are in the message list you can play any message.

3 Press [2] to play the current message.

4 Press [9] to call the caller.
CallPilot dials the external number directly.

Chapter 7
Off-premise Message Notification

About Off-premise Message Notification

Off-premise Message Notification notifies you or a designated agent when there are new or urgent messages in the skillset mailbox. You can receive Off-premise Message Notification at any tone dial telephone number, pager or extension.

Note: Set up Off-premise Message Notification for non-business hours. Then Off-Premise Message Notification does not consume a Reserved or voice channel during busy periods.

You can receive notification of a message at a maximum of five different destination numbers. When the number of retry attempts is reached for each destination number, the next number in the series is called. For example, Contact Center can call your car phone first when there is a message in the skillset mailbox. If there is no answer, Contact Center waits five minutes and calls your car phone again. If there is still no answer, Contact Center calls your car phone a third time. If there is no answer after three calls, Contact Center calls the your home phone. Contact Center continues to call at five minute intervals until the call is answered or all of the destinations are called three times.

Off-premise Message Notification, the Retry Intervals and Maximum Number of Attempts for skillset mailboxes are assigned through the Class of Service settings in CallPilot Manager. Skillset mailboxes have a default Class of Service of 1.

Class of Service 1 has these default settings for Off-premise Message Notification:

- Off-premise Message Notification enabled
- a Retry Interval of five minutes
- a Maximum Number of Attempts of 3

For information about changing Class of Service settings, see the *CallPilot Manager Set Up and Operation Guide.*

You must assign start and stop times for phone and destinations. Off-premise Message Notification begins when the start time is reached. Set the start time for a time when you are at the destination number so that you are there to receive calls.

A person who receives a Off-premise Message Notification call can cancel Off-premise Message Notification to their destination number. This is useful if a destination is incorrectly programmed and a wrong party receives the calls.

The recipient of an Off-premise Message Notification call hears the following voice prompt: "*Message for (name of mailbox owner). To log on press* 1 . *If you have received this call by mistake, please press* 2 .

After you set the Off-premise Message Notification parameters, Off-premise Message Notification is enabled automatically.

Assigning an outdial method to a skillset mailbox

The outdial method determines which line, line pool or route code the system uses for Off-premise Message Notification.

The default for outdial method is None. You must assign an outdial method before you can use an external telephone or a pager as an Off-premise Message Notification destination.

For more information about line pools and route codes, see your system documentation.

Warning: Do not change the extension number assigned to the skillset mailbox. If this extension number is changed, callers in the skillset cannot access the skillset mailbox and you cannot change the Skillset general parameters.
To correct a wrong extension number, change the extension number to the Control DN of the skillset.

To assign an outdial method to a skillset mailbox

1. Start CallPilot Manager.
2. Click the **Mailbox Administration** heading.
   The Mailbox List page appears.
3. Click the **Change** link for the skillset mailbox you want to set up an outdial route for.
   The Mailbox page for the mailbox appears.
4. From the **Outdial Type** list box select the type of outdial method you want to use.
5. If you use a line or a line pool, in the **Line/Pool#** type the number of the outgoing line or line pool number you want to assign to the skillset mailbox for outdialing.
6. Click **Submit**.

Off-premise Message Notification parameters

You can set up the parameters for Off-premise Message Notification from any phone.

The parameters are:

- destination type (phone, extension or pager)
- destination number (phone, extension or pager)
- time range for receiving calls at phone numbers or extension (Pagers are notified any time there is a qualifying message.)

- types of message you want to receive (all new messages or just urgent messages)

Note: The restrictions that apply to your phone line also apply to Off-premise Message Notification numbers. For example, if you cannot dial long distance phone numbers from your phone, you cannot have a long distance Off-premise Message Notification destination number.

Setting up Off-premise Message Notification

Follow these instructions if you have not set up Off-Premise Message Notification and are setting it up for the first time. If you have set up Off-Premise Message Notification, see the section on "Changing Off-premise Message Notification" on page 101.

To set up Off-premise Message Notification to	see
a phone number	page 93
an extension	page 95
a pager	page 97

To set up Off-premise Message Notification to a phone number

1 Press [✆] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN  SELECT
```

3 Press ADMIN or [1] to set up Off-premise Message Notification.

```
Destination:
PHONE   EXT   PAGER
```

4 Press PHONE or [1] to choose a phone number destination.

```
Ph:
RETRY          OK
```

5 Enter the destination phone number and press OK or #. The destination phone number is a maximum of 30 digits.

```
<x>
ADD            OK
```

6 Press OK or # to accept the destination phone number represented by <x>
or
press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

After you add special characters, press OK or # to accept the destination number.

```
Start hhmm:
RETRY          OK
```

7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by a zero.

```
<start time>
RETRY    AM    PM
```

8 Press AM or 1
or
PM or 2.

```
<start time>
RETRY          OK
```

9 Press OK or # to accept the start time.

```
Stop hhmm:
RETRY          OK
```

10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single-digit hour and minute must be preceded by a zero.

```
<stop time>
RETRY    AM    PM
```

11 Press AM or 1
or
PM or 2.

```
<stop time>
RETRY          OK
```

12 Press OK or # to accept the stop time.

```
More dest?
YES      NO
```

13 Press YES or 1 if you want to set up another destination number
or
press NO or # if you do not want to set up another destination number.

```
Start:<start time>
CHNG           NEXT
```

14 Press NEXT or # to accept the start time that you entered
or
press CHNG or 1 to change the start time.

```
Stop:<stop time>
CHNG           NEXT
```

15 Press NEXT or # to accept the stop time that you entered
or
press CHNG or 1 to change the stop time.

```
Msg type: new
CHNG          OK
```

16 Press OK or # if you want to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN   SELECT
```

17 Press ☎ to end the session.

To set up Off-premise Message Notification to an extension

1 Press ✆ 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press 8 5 to open the Mailbox Tools
- Press NOTIF or 2 to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or 8
- Press 6 to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN         SELECT
```

3 Press ADMIN or 1 to set up Off-premise Message Notification.

```
Destination:
PHONE   EXT   PAGER
```

4 Press EXT or 2 to choose an extension as the destination.

```
Ext:
RETRY         OK
```

5 Enter the destination number and press OK or #.

```
Accept:<x>
RETRY         OK
```

6 Press OK or # to accept the destination extension.
The <x> represents the extension.

```
Start hhmm:
RETRY         OK
```

7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by zero.

```
<start time>
RETRY    AM     PM
```

8 Press AM or 1
or
PM or 2.

```
<start time>
RETRY          OK
```

9 Press OK or # to accept the start time.

```
Stop hhmm:
RETRY          OK
```

10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single-digit hour and minute must be preceded by a zero.

```
<stop time>
RETRY    AM    PM
```

11 Press AM or 1
or
PM or 2.

```
<stop time>
RETRY          OK
```

12 Press OK or # to accept the stop time.

```
More dest?
YES      NO
```

13 Press YES or 1 if you want to set up another destination number
or
press NO or # if you do not want to set up another destination number.

```
Start:<start time>
CHNG           NEXT
```

14 Press NEXT or # to accept the start time that you entered
or
press CHNG or 1 to change the start time.

```
Stop:<stop time>
CHNG           NEXT
```

15 Press NEXT or # to accept the stop time that you entered
or
press CHNG or 1 to change the stop time.

```
Msg type: new
CHNG           OK
```

16 Press OK or # if you want to be notified when you the skillset mailbox receives a new message
or
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN   SELECT
```

17 Press ☎ to end the session.

About setting up Off-premise Message Notification to a pager number

Example of a destination pager number

If you are assigning a pager destination number from behind a PBX, remember to insert a 9 (depending on your system) before the # to access an outside line.

There is a combined limit of 30 characters for the pager phone number and the pager message.

For example, to reach your pager, enter:

4 2 5 5 5 1 2 3 4 # 3

where:

- [#] specifies the next digits are special characters
- [4] recognize dial tone
- [2] specifies that the next digits are the numbers to be dialed
- [5] [5] [5] [1] [2] [3] [4] is the pager phone number dialed
- [3] inserts a timed pause

Depending on the company supplying your paging service, the programming sequence can vary. For more information about setting the destination phone number parameters for your pager, contact your pager company.

To set up Off-premise Message Notification to a pager

1 Press [⚙] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN   SELECT
```

3 Press ADMIN or [1] to set up Off-premise Message Notification.

```
Destination:
PHONE   EXT   PAGER
```

4 Press PAGER or [3] to select a pager number destination.

```
Pager:
RETRY            OK
```

5 Enter the destination pager number and press OK or [#].

```
<x>
ADD              OK
```

6 Press OK or # to accept the destination pager number represented by <x>
or
press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

After you add special characters, press OK or #.

```
Show:<xxxx>
CHNG            NEXT
```

7 Press NEXT or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you
or
press CHNG or 1 to change the pager message.
The combined limit is 30 characters for the pager phone number and the pager message.

```
More dest?
YES      NO
```

8 Press YES or 1 if you want to set up another destination number
or
press NO or # if you do not want to set up another destination number.

```
Msg type: new
CHNG             OK
```

9 Press OK or # to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 to change the message type to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN   SELECT
```

10 Press ☎ to end the session.

To set up Off-premise Message Notification to more than one destination

You can receive notification of a message at a maximum of five different destination numbers. The following steps show you how to enter a phone number destination and then add a pager destination for the first time.

1 Press [✆] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN   SELECT
```

3 Press ADMIN or [1] to set up Off-premise Message Notification.

```
Destination:
PHONE   EXT   PAGER
```

4 Press PHONE or [1] to choose a destination phone number.

```
Ph:
RETRY            OK
```

5 Enter the destination phone number and press OK or [#]. The destination phone number cannot be longer than 30 digits.

```
<x>
ADD              OK
```

6 Press OK or [#] to accept the destination phone number, represented by <x>
or
press ADD or [2] to add special characters and use your dialpad or follow the voice prompts to add characters.

```
Start: hhmm:
RETRY            OK
```

7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by a zero.

```
<start time>
RETRY    AM      PM
```

8 Press AM or [1]
or
PM or [2].

```
<start time>
RETRY          OK
```

9 Press OK or # to accept the start time.

```
Stop hhmm:
RETRY          OK
```

10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single digit hour and minute must be preceded by a zero.

```
<stop time>
RETRY   AM     PM
```

11 Press AM or 1
or
PM or 2.

```
<stop time>
RETRY          OK
```

12 Press OK or # to accept the stop time.

```
More dest?
YES     NO
```

13 Press YES or 1 to set up another destination number.

```
Notify2: none
SETUP          NEXT
```

14 Press SETUP to set up another destination number.

```
Destination:
PHONE   EXT    PAGER
```

15 Press PAGER or 3 to select a pager number destination.

```
Pager:
RETRY          OK
```

16 Enter the destination pager number and press OK or #.

```
<xxxx>
ADD            OK
```

17 Press OK or # to accept the destination pager number represented by <x>
or
press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

After you add special characters, press OK or #.

```
Show<xxxx>
CHNG           NEXT
```

18 Press NEXT or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you
or
press CHNG or 1 to change the pager message.
The combined limit is 30 characters for the pager phone number and the pager message.

```
Notify2: pager
CHNG   OTHR    NEXT
```

19 The display shows that the second destination is a pager.
Press NEXT or # to continue.

```
Notify 3: none
SETUP          NEXT
```

20 Press NEXT or # to continue
or
press SETUP to add another destination.

```
Start:<start time>
CHNG          NEXT
```

21 Press NEXT or # to accept the start time that you entered
or
press CHNG or 1 to change the start time.

```
Stop:<stop time>
CHNG          NEXT
```

22 Press NEXT or # to accept the stop time that you entered
or
press CHNG or 1 to change the stop time.

```
Msg type: new
CHNG          OK
```

23 Press OK or # to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN   SELECT
```

24 Press ☎ to end the session.

Changing Off-premise Message Notification

You can change the parameters and destinations for Off-Premise Message Notification. Refer to "Off-premise Message Notification parameters" on page 92 for more information about parameters.

If you want to change the time or message type parameters, use the procedure "To change the time range or type of message parameters" on page 101

If you want to change the destination type, see the procedure for the destination type.

To change the destination type	see
from a phone to an extension, pager or another phone number	page 103
from a pager to an extension or phone	page 105
from a phone or extension to a pager	page 106

To change the time range or type of message parameters

1 Press ✆ 9 8 1.
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press 8 5 to open the Mailbox Tools
- Press NOTIF or 2 to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or 8
- Press 6 to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN   SELECT
```

3 Press ADMIN or 1 to set up Off-premise Message Notification.

```
Notify:<x>
CHNG          NEXT
```

4 Press NEXT.
If you want to change the destination type, see "To change the destination type" on page 101 for the appropriate procedure.

```
More dest?
YES      NO
```

5 Press NO or # to continue.

```
Start:<start time>
CHNG          NEXT
```

6 Press CHNG or 1 to change the start time
or
press NEXT or # to accept the start time.

```
Stop:<stop time>
CHNG          NEXT
```

7 Press CHNG or 1 to change the stop time
or
press NEXT or # to accept the stop time.

```
Msg type: new
CHNG           OK
```

8 Press CHNG or 1 to change the message type to urgent.
Press OK or # to accept the new default message. You can choose to be notified of all new messages or urgent messages only. Change the message type to urgent to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN   SELECT
```

9 Press ☎ to end the session.

To change the destination from phone to another destination

1 Press [⚙] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN   SELECT
```

3 Press ADMIN or [1] to set up Off-premise Message Notification.

```
Notify: phone
CHNG          NEXT
```

4 Press CHNG or [1] to change the destination.

```
Destination:
PHONE   EXT   PAGER
```

5 Press PHONE or [1] to choose another phone number destination
or
press EXT or [2] to choose an extension destination
or
press PAGER or [3] to choose a pager number destination.

```
<x>
RETRY         OK
```

6 Enter the destination number and press OK or [#].
The destination phone number cannot be longer than 30 digits.

```
Accept:<xxxx>
RETRY         OK
```

7 Press OK or [#] to accept the destination number
or
press RETRY or [*] to re-enter the destination number.

```
Notify:<x>
CHNG          NEXT
```

8 Press NEXT or [#] to continue
or
press CHNG or [1] to change the destination, and repeat steps 6 through 8.

```
More dest?
YES     NO
```

9 Press YES or [1] if you want to set up another destination number
or
press NO or [#] if you do not want to set up another destination number.

```
Start:<start time>
CHNG          NEXT
```

10 Press CHNG or 1 to change the start time
or
press NEXT or # to accept the start time.

```
Stop:<stop time>
CHNG          NEXT
```

11 Press CHNG or 1 to change the stop time
or
press NEXT or # to accept the stop time.

```
Msg type:new
CHNG           OK
```

12 If you want to change message notification,
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.
Press OK or #.

```
Msg notify
ADMIN   SELECT
```

13 Press ☎ to end the session.

To change the destination from pager to phone or extension

1 Press [⚙] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN   SELECT
```

3 Press ADMIN or [1] to change Off-premise Message Notification. The displays a review of the first destination type and destination number.

```
Modify:pager
CHNG          NEXT
```

4 Press CHNG or [1] to change the destination type and the destination number.

```
Destination:
PHONE   EXT   PAGER
```

5 Choose the type of destination number:
press PHONE or [1] to choose a phone number destination
or
press EXT or [2] to choose an extensiondestination.

```
<xxxx>:
RETRY          OK
```

6 Enter the destination number you want to set up Off-Premise Message Notification for.
<x> represents the destination number.
Press OK or [#] to accept the destination number
or
press RETRY or [*] to re-enter the number.

```
Notify:<x>
CHNG          NEXT
```

7 Press NEXT or [#] to continue.

```
More dest?
YES     NO
```

8 Press YES or [1] if you want to set up another destination, and repeat steps 6 through 8
or
press NO or [#] if you do not want to set up another destination.

```
Start:<start time>
CHNG          NEXT
```

9 Press CHNG or 1 to change the start time
or
press NEXT or # to accept the start time.

```
Stop:<stop time>
CHNG          NEXT
```

10 Press CHNG or 1 to change the stop time
or
press NEXT or # to accept the stop time.

```
Msg type:new
CHNG          OK
```

11 If you want to change message notification,
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.
Press OK or #.

```
Msg notify
ADMIN    SELECT
```

12 Press ☎ to end the session.

To change the destination from phone or extension to pager

1 Press ✆ 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press 8 5 to open the Mailbox Tools
- Press NOTIF or 2 to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or 8
- Press 6 to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN    SELECT
```

3 Press ADMIN or 1 to change Off-premise Message Notification.
The displays show a review of the first destination type and destination number.

```
Notify:<x>
CHNG          NEXT
```

4 Press CHNG or 1 to change the destination type and the destination number.
<x> represents the type of destination (phone or extension).

```
Destination
PHONE   EXT   PAGER
```

5 Press PAGER or 3 to choose a pager number destination.

```
Pager:
RETRY          OK
```

6 Enter the pager number and press OK or # to continue.

```
<x>
ADD            OK
```

7 Press OK or # to accept the destination pager number represented by <x>
or
press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

After you add special characters, press OK or #.

```
Show:<xxxx>
CHNG           NEXT
```

8 Press NEXT or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you
or
press CHNG or 1 to change the pager message.
The combined limit is 30 characters for the pager phone number and the pager message.

```
Notify: pager
CHNG           NEXT
```

9 The display shows notification is set up to a pager.
Press NEXT or # to continue.

```
More dest?
YES      NO
```

10 Press YES if you want to set up another destination number
or
press NO if you do not want to set up another destination number.

```
Msg type: new
CHNG           OK
```

11 Press OK or # if you want to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN    SELECT
```

12 Press ☎ to end the session.

Deleting a destination number

If you have more than one destination number for Off-premise Message Notification, you can delete a destination.

To delete a destination number

1 Press [ ] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN   SELECT
```

3 Press ADMIN or [1] to set up Off-premise Message Notification.

```
Notify1:<x>
CHNG    OTHR    NEXT
```

4 Press OTHR if you want to delete the first destination
or
press NEXT or [#] to view the other destinations until you find the destination that you want to delete. When you find the destination that you want to delete, press OTHR.

```
Notify 1:<x>
DEL     INS     QUIT
```

5 Press DEL to delete the first destination number.

```
Notify1:<x>
CHNG    OTHR    NEXT
```

6 The first destination number is deleted. The Notify 2 destination changes to become the Notify 1 destination number.
To delete more destination numbers, press OTHR and repeat steps 4 and 5.

```
Msg notify
ADMIN   SELECT
```

7 Press [ ] to end the session.

Adding a destination number

Use this procedure if you have set up Off-premise Message Notification and you want to add another destination number. You can have up to five destination numbers.

To add a destination number

1 Press [⚙] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN  SELECT
```

3 Press ADMIN or [1] to set up Off-premise Message Notification.

```
Notify:<x>
CHNG          NEXT
```

4 Press NEXT or [#] to continue.

```
More dest?
YES     NO
```

5 Press YES or [1] to set up another destination number.

```
Notify2: none
SETUP         NEXT
```

6 Press SETUP or [1] to set up another destination number and follow the steps in one of the following procedures:

- "To set up Off-premise Message Notification to a phone number" on page 93
- "To set up Off-premise Message Notification to an extension" on page 95
- "To set up Off-premise Message Notification to a pager" on page 97

Turning Off-premise Message Notification on or off

You can turn Off-premise Message Notification on or off at any time. If you turn Off-premise Message Notification off, you do not affect any of the assigned parameters.

To turn Off-premise Message Notification on or off

1 Press [ ] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN  SELECT
```

3 Press SELECT or [2] to set up Off-premise Message Notification.

```
Notify on
CHNG    TIME     OK
```

4 Press CHNG or [1] to turn Off-premise Message Notification off if it is on (as shown).

```
Notify off
CHNG    TIME     OK
```

5 Press OK or [*]
or
press TIME to review the start and stop time parameters.

```
Mailbox admin
GREET   PSWD   QUIT
```

6 Press [ ] to end the session.

Chapter 8
Recording Contact Center greetings

About Contact Center greetings

Contact Center greetings encourage callers to stay on the line until an agent is available. You can record greetings in different languages and change them as often as you like.

You can include information in your greetings such as:

- your hours of service
- a request for callers to have their account number ready
- how to leave a message
- an announcement of a sale
- product lists
- upcoming special events

The table "Intelligent Contact Center Capacities for BCM50" on page 18 shows how many greetings you can record, depending on which Contact Center you use.

You can record greeting numbers and information in "Contact Center Greetings" on page 238.

Examples of Contact Center greetings

You can record different types of greetings for Contact Center. Before you record your greeting, determine what information the greeting includes. When you prepare your greeting, include important times and dates. Keep greetings as short and concise as possible. Use the following examples of greetings as a reference.

General company greeting	The general company greeting informs callers that they have reached the correct company. It can also include the location and business hours of your company. *"Thank you for calling Bridgestone Computers. We are located at 52 Main Street. Our hours of service are Monday to Friday from 8:00 until 5:00. Please stay on the line and an agent will be with you as soon as possible. Or press* 0 *to leave a message and one of our agents will return your call."*
Please wait greeting	Please wait greetings encourage callers to stay on the line. *"All our agents at Bridgestone Computers are currently busy, but please hold as your call is very important to us."*

Information greeting	An information greeting provides messages and greetings to callers. "*Thank you for calling Bridgestone Computers. This week we have extended our hours until we sell all spring merchandise. We will be open until 9:00 pm Monday through Thursday, and we will be open until midnight on Friday! Please come in and see us at 52 Main Street.*"
Transfer greeting	A transfer greeting lets a caller transfer their call. *"Please press 1 to leave a message and one of our agents will return your call. Press 2 to return to the previous choices."*
Non-business hours greeting	Your non-business hours greeting will be played after your business is closed: "*You have reached Bridgestone Computers. Our hours of service are Monday to Friday from 8:00 until 12:00 and 1:00 until 5:00. To leave a message, please press zero. An agent will return your call when we re-open. Thank you for calling.*"
Expected Wait Time greeting	EWT greetings notify callers of their expected wait time in a skillset. *"Based on the current volume of calls, the next agent will be available in two minutes."*

Recording a Contact Center greeting

Before you record a greeting, write the greeting out so that you include everything that you want to say.

We recommend that you record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, callers must wait in a skillset a longer time before they hear another greeting.

To record a Contact Center greeting

1 Click the **Contact Center** heading.

2 Click the **Greetings** link.
The Contact Center Greetings page appears.

3 Click the **Voice** link for the number of the greeting you want to record.
The page you can record a greeting from appears.

4 In the **Connect to** box, type the extension number or telephone number you are using to record the greeting.
For a local extension, type the extension number. For a telephone number that is not a local extension, type the sequence of digits that dial the telephone number from the voicemail system. For example, you might need to dial 9, the area code, and then the telephone number. For a telephone number that is not a local extension, the number you dial must use a destination code. For more information about destination codes, see your telephony System Administrator.

5 Click **Dial**.
The telephone rings.

6 Pick up the handset. Do not use Handsfree. Click **Record**. After the tone, record your greeting.

7 After you finish recording, click **Stop.**

8 To listen to the recording, click **Play**
or
to save the recording, click **Save**.
The recording replaces a previously recorded greeting.

9 Click **Close** and replace the telephone handset.

Note: You can disconnect the telephone by clicking the Hang Up button or replacing the telephone handset. The next time you use Play or Record, the phone number shown in the Connect to box is dialed. You do not need to hang up each time. The connection remains for several minutes, even if you close the page. You can access another greeting without having to re-answer your telephone. The connection disconnects after several minutes of inactivity, or if you log off CallPilot Manager.

10 If you want to enter a caption for the greeting, click **Refresh** on your browser.

11 Click the **Add Caption** link for the greeting.
The Greeting Caption page appears.

12 In the **Greeting** box type a descriptive name for the greeting.
The greeting caption can be a maximum of 30 characters.

13 Click **Submit**.

Note: If you want to change the Greeting Caption, click the Change Caption link and make your changes.

Importing a Contact Center greeting

You can import a previously recorded greeting in .wav file format, so that you can use the same greetings across your system.

The .wav file format must be:

- Bit Rate — 8 KHz
- Audio sample size — 16 bit
- Channels — mono or stereo
- Audio format — PCM

To import a previously recorded greeting

1 Click the **Contact Center** heading.

2 Click the **Greetings** link.
The Contact Center Greetings page appears.

3 Click the **Voice** link for the number of the greeting you want to record.
The page you can record a greeting from appears.

4 If you know the location of the greeting, in the **Import** box type the location of the file and Click **Send**
or
if you do not know the location of the greeting, at the **Import** option click **Browse** and follow steps 6 through 9.
The Open dialog box appears.

5 From the **Look in** list, select the location of the file.

6 In the **File name** box, type the file name.

7 From the **Files of type** list, select the file type.

8 Click **Open**.

9 Click **Send**.

10 To play the greeting, in the **Connect to** box type an extension or telephone number and click **Play**.
Your telephone rings.

11 Answer the telephone to listen to the greeting.

12 Click **Save** to save the greeting.
The greeting you save replaces the previously recorded greeting.

13 Click **Close** and replace the telephone handset.

14 If you want to enter a caption for the greeting, click **Refresh** on your browser.

15 Click the **Add Caption** link for the greeting.
The Greeting Caption page appears.

16 In the **Greeting** box type a descriptive name for the greeting.
The greeting caption can be a maximum of 30 characters.

17 Click **Submit**.

Note: If you want to change the Greeting Caption, click the Change Caption link and make your changes.

Exporting a Contact Center greeting

You can export a previously recorded greeting to a computer file in .wav or in its native format. Export the greeting in its native format if you want to reimport the file later. You can reimport the file to your system, or to another Contact Center or CallPilot system. Export the file in its native format if you want to use the same greetings at different company locations. If you keep the file in its native format, you avoid converting the file to another format, which can lessen its sound quality.

Export the greeting in .wav format if you want to edit the sound file on your computer.

To export a previously recorded greeting

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Greetings** link.
   The Contact Center Greetings page appears.
4. Click the **Voice** link for the number of the greeting you want to export.
   The page you can export a greeting from appears.
5. At the **Export** option click either the **Native Encoding** or **WAV Encoding** link.
   The File Download dialog box appears.
6. Click **Save this file to disk** and Click **OK**.
   The Save As dialog box appears.
7. From the **Save in** list box, navigate to where you want to save the file and click **Save**.

Chapter 9
Setting up Intelligent Routing

About Intelligent Routing

Intelligent Routing gives you tremendous flexibility in controlling how calls are routed. Intelligent Routing includes these methods for moving a call, based on various conditions:

Intelligent CLID/DNIS Routing	• the ability to route calls according to Multimedia Contact Center, CLID/ANI, DNIS, ISDN Calling Number • this routing is applied when the call first enters the Contact Center • for information about CLID/DNIS routing, see "Setting up CLID/DNIS Routing" on page 59.
Intelligent Caller Input Routing, Basic	• the ability to route calls to the Automated Attendant, a CCR Tree, an operator or a skillset mailbox • this routing is applied when callers press a key in response to instructions in a greeting
Intelligent Caller Input Routing, Advanced	• includes the basic capabilities plus the ability to create rules that route calls to other skillsets and locations depending on the caller input • lets you change the priority of the call
Intelligent Overflow Routing	• routes calls to extensions, mailboxes, external phone number, the Automated Attendant, the skillset mailbox or CCR Tree as a transfer target • lets you change the priority of the call

Intelligent Overflow Routing

Use Intelligent Overflow Routing to control how calls are handled that are waiting in a skillset for an agent. You can specify that a waiting call:

- overflows to one or more skillsets and keeps its conditions and original skillset greetings. Agents from the specified skillsets can answer the call.
- moves to another skillset where the call loses its conditions, and takes on the properties of the new skillset, including skillset greetings. The system tracks the total length of the call from the time the call enters the system until it is answered.
- transfers to the skillset mailbox
- transfers to an extension, mailbox, external telephone number, CCR Tree, Automated Attendant or operator
- changes in priority level

Intelligent Overflow Routing handles calls differently depending on the rules that you create. Each rule is based on a mode, one or more conditions, and one or more actions.

Mode

Intelligent Overflow Routing looks at the mode the skillset is in to determine how to handle a call. A skillset can be in Day mode, Night mode, or 24 Hour Service. Each mode can have its own rules for how to handle calls. The default mode is Day.

Condition

After Intelligent Overflow Routing determines what mode the skillset is in, Intelligent Overflow Routing determines what conditions apply to the call. The two possible conditions are:

- Whether the timer expires. You set the length of time a call waits for an agent before the call is sent to the destination that you specify. The maximum time a call can wait is 59:59. When a call enters a skillset, the timer starts at 00:00. Overflow rules are applied according to the time a call is in a skillset, not according to the total time a call is in the system. For example, if you set up skillset 1 to move a call to skillset 2 after five minutes, and you set up skillset 2 to move a call to skillset 1 after two minutes, a call in skillset 1 will be moved to skillset 2 after five minutes. The call will move back to skillset 1 after an additional two minutes, then back to skillset 2 after an additional five minutes.

- Whether there are agents logged on to the skillset. If there are no agents logged on to the skillset, the call is sent to the destination that you specify. If you select the Agents Not Logged In check box, the overflow rule applies if there are no agents logged on to the skillset. If you do not select the Agents Not Logged In check box, the overflow rule applies if there are agents logged on to the skillset.

Note: You can select both conditions within the same rule. The rule applies when both conditions are met.

Action

When Intelligent Overflow Routing determines that a condition is met for the call, the call goes to the destination you specify. Possible actions are:

- moving the call to a new skillset.
  The caller hears the greetings for the new skillset.
- overflowing the call to one or more skillsets.
  The caller continues to hear the greetings from the original skillset.
- sending the call to the skillset mailbox
- transferring the call to an extension, external number, mailbox, skillset mailbox, Automated Attendant, CCR Tree or operator

- changing the priority of the call

Note: Note: if an overflow step is configured for No Agents, the overflow rule executes right away, and even a forced greeting will not play. If you want to play the greeting, configure a timer with the No Agents rule.

Examples of Intelligent Overflow Routing rules

Intelligent Overflow Routing gives you flexibility in setting the rules for how calls are handled. The following tables show examples of different ways you can configure Intelligent Overflow Routing rules.

Example 1

In this example, calls to the contact center go to skillset 1, which is the company's service department. If a call is not answered by an agent within two and a half minutes, the call overflows to skillsets 2 and 3, the sales department skillsets. An agent from any of the three skillsets can answer the call.

The Contact Center Administrator:

- selects the Day service mode
- sets the timer for 2 minutes and 30 seconds
- selects Overflow to Skillset as the action
- selects skillsets 2 and 3

Mode	Conditions	Action	Explanation
Day	02:30	Overflow: 2,3	This Intelligent Overflow Routing rule applies only if there are one or more agents are logged on. If a call is not answered by an agent before 2 minutes and 30 seconds, the call overflows to skillsets 2 and 3. When a call overflows, it also remains queued at the original skillset destination.

Note: If you want calls to overflow to multiple skillsets, specify all the skillsets in the same rule. The call bypasses skillsets with busy agents and overflows to the next skillset with an available agent.

Example 2

In this example, calls to the contact center go to skillset 1. The Administrator wants to ensure that lower priority calls do not wait in a skillset indefinitely. If a call waits for 2 minutes or more, a higher priority is assigned to the call.

The Contact Center Administrator:

- selects the 24 Hour Service mode
- sets the timer for 2 minutes

- selects Change Call Priority only as the action and selects 1 as the new call priority

Mode	Conditions	Action	Explanation
24 Hour	02:00	Change call priority to 1	This Intelligent Overflow Routing rule applies to any call that has been waiting in skillset 1 for 2 minutes. If a call is not answered by an agent when the timer elapses, the call priority changes to the highest priority.

Example 3

In this example, calls to the contact center go to skillset 1, which is the company help line. If there are no agents logged on to the help line, the call moves to skillset 2, which is the company's service department. When a call moves to a new skillset, it does not remain queued at the original skillset destination.

The Contact Center Administrator:

- selects the Day service mode
- selects the Agents not logged in check box
- selects Move to Skillset as the action
- selects skillset 2

Mode	Conditions	Action	Explanation
Day	No Agents	Move to Skillset 2	Intelligent Overflow Routing checks to see whether agents are logged on to skillset 1, but does not check the timer. If there are no agents logged on to skillset 1, the call moves to skillset 2 and gets the new greetings for skillset 2. When a call moves to a new skillset, it does not remain queued at the original skillset destination.

Example 4

In this example, calls to the contact center go to skillset 1, which is the company help line. If no agents are logged on to skillset 1, the call immediately moves to skillset 2. If agents are logged on to skillset 1 and the call is not answered within two and a half minutes, the call transfers to the skillset mailbox where the caller can leave a message.

The Contact Center Administrator creates two rules. In the first rule the Contact Center Administrator:

- selects the 24 Hour service mode
- selects the Agents not logged in check box
- selects Move to Skillset as the action
- selects skillset 2

In the second rule the Contact Center Administrator:

- selects the 24 Hour service mode

- sets the timer to 2 minutes and 30 seconds
- selects the skillset mailbox as the action

Mode	Conditions	Action	Explanation
24 Hour	No Agents	Move to Skillset 2	The call moves to skillset 2 if no agents are logged on. If agents are logged on and the call is not answered within 2 minutes and 30 seconds, the call transfers to the skillset mailbox.
24 Hour	02:30	Skillset Mailbox	

Example 5

In this example, calls to the contact center go to skillset 1, which is the company's help line. If the call is not answered by an agent within 2 minutes and 30 seconds and if there are no agents logged on to skillset 1, the call overflows to skillset 2, which is the service department. If the call is not answered within an additional two minutes, the call transfers to the skillset mailbox where the caller can leave a message.

The Contact Center Administrator creates two rules. In the first rule the Contact Center Administrator:

- selects the Day service mode
- sets the timer to 2 minutes and 30 seconds
- selects the Agents not logged in check box
- selects Overflow to skillset as the action
- selects skillset 2

In the second rule the Contact Center Administrator:

- selects the Day service mode
- sets the timer to 4 minutes and 30 seconds
- selects the Agents not logged in check box
- selects the skillset mailbox as the action

Mode	Conditions	Action	Explanation
Day	02:30 and No Agents	Overflow: 2	The call overflows to skillset 2 after the call is in skillset 1 for 2 minutes and 30 seconds and if there are no agents logged on to skillset 1. If the call is not answered within an additional 2 minutes the call transfers to the skillset mailbox.
Day	04:30 and No Agents	Skillset Mailbox	

Example 6

In this example, calls to the contact center go to skillset 1, which is the company's help line. The Night Service Mode is set to start at 6:00 pm. After 6:00 pm there are no other skillsets with agents logged on. If no agents are logged on to skillset 1 or if the call is not answered by an agent within two and a half minutes, the call transfers to the skillset mailbox.

In this example, the Contact Center Administrator inserts two rules. The Contact Center Administrator:

- selects the Night service mode for both rules
- sets the timer to 2 minutes and 30 seconds as the condition for the first rule
- selects the Agents not logged in check box as the condition for the second rule
- selects the skillset mailbox as the action for both rules

Mode	Conditions	Action	Explanation
Night	02:30	Skillset Mailbox	The call transfers to the skillset mailbox if the call is not answered within 2 minutes and 30 seconds.
Night	No Agents	Skillset Mailbox	The call transfers to the skillset mailbox if there are no agents logged on to skillset 1.

Example 7

In this example, calls to the contact center go to skillset 1, which is the company's order desk. Skillset 1 agents are the company's experienced sales agents. If no agents are logged on to skillset 1 and if the call is not answered by an agent within two and a half minutes, the call overflows to skillset 2. Skillset 2 agents are the company's less experienced sales agents.

The Contact Center Administrator:

- selects the Day service mode
- sets the timer to 2 minutes and 30 seconds
- selects the Agents not logged in check box
- selects Overflow as the action
- selects skillset 2

Mode	Conditions	Action	Explanation
Day	02:30 and No Agents	Overflow: 2	The call overflows to skillset 2 if the call is not answered within 2 minutes and 30 seconds and if there are no agents logged on to skillset 1.

Example 8

In this example, calls to the contact center are answered by skillset 1, the company's sales skillset. If a call is not answered within 10 seconds, it overflows to skillsets 2, 3 and 4. If the call is not answered within an additional 20 seconds, the call goes to the skillset 1 mailbox.

The Contact Center Administrator creates two rules.

In the first rule the Contact Center Administrator:

- selects the Day service mode
- sets the timer to 10 seconds
- sets Overflow as the action
- selects skillsets 2, 3 and 4

In the second rule the Contact Center Administrator:

- selects the Day service mode
- sets the timer to 30 seconds
- selects the skillset mailbox as the action

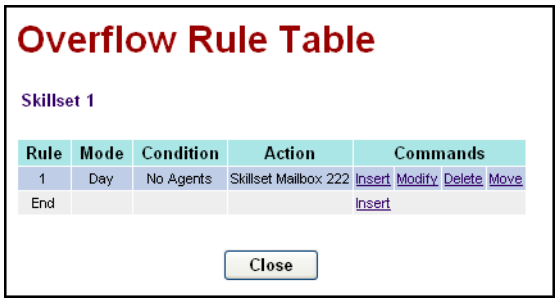
Mode	Conditions	Action	Explanation
Day	00:10	Overflow: 2, 3, 4	The call overflows to skillsets 2, 3 and 4 if the call is not answered within 10 seconds. The call goes to the skillset mailbox if it is not answered within an additional 20 seconds.
Day	00:30	Skillset Mailbox	

Assigning Intelligent Overflow Routing to a skillset

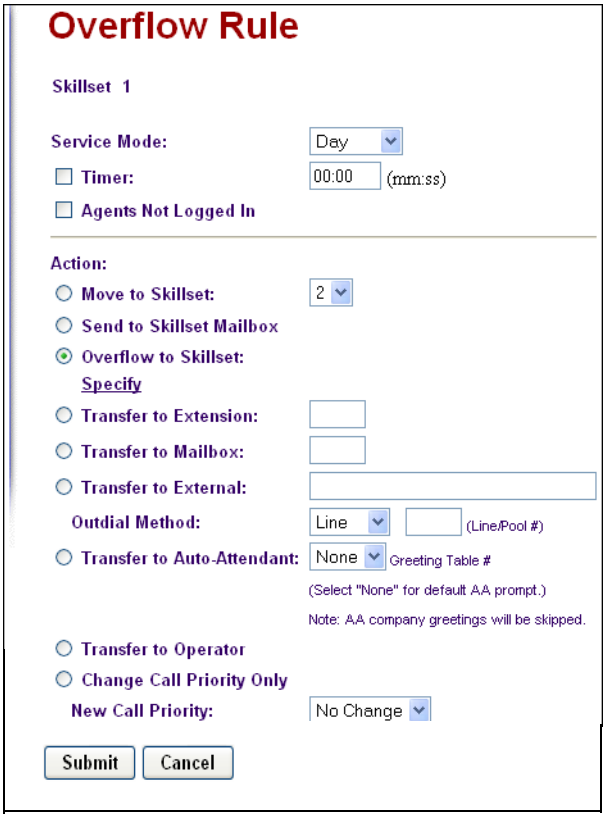
To assign Intelligent Overflow Routing

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.

4 Click the **Overflow** link for the skillset you want to add Intelligent Overflow Routing to. The Overflow Rule Table page appears.



5 Click the **Insert** link for Rule 1.
The Overflow Rule page appears.



6 From the **Service Mode** list box select **Day**, **Night** or **24 Hour**.

7 Select the **Timer** check box if you want Intelligent Overflow Routing to time how long the call waits, and enter the time that a call waits in the skillset before it goes to the destination that you specify.

8 Select the **Agents Not Logged In** check box to if you want Intelligent Overflow Routing to check whether there are agents logged on to the skillset
or

do not select the **Agents Not Logged In** check box and Intelligent Overflow Routing does not check to see if agents are logged on to the skillset.

9 At the **Action** option, select the destination for calls:

- to send the call to another skillset, select **Move to Skillset**, and from the list box select the skillset you want to move to call to. If you also want to change the priority of the call, from the **New Call Priority** list box select a new priority for the call. The default is 10.
- to send the call to the skillset mailbox, select **Send to Skillset Mailbox**
- to overflow the call to another skillset:
  - Select **Overflow to Skillset** and click the **Specify** link.
    The Overflow to Skillset Configuration page appears.
  - Select the check box for the skillset you want to overflow to, and click **Submit**.
  - If you want to change the priority of the call, from the **New Call Priority** list box select a new priority for the call. The default is 10.
- to transfer the call to an extension, select **Transfer to Extension** and enter the extension number
- to transfer the call to a mailbox, select **Transfer to Mailbox** and enter the mailbox number
- to transfer the call to an external number:
  - Select **Transfer to External**
  - Enter the external number
  - From the **Outdial Method** list box select **Line**, **Pool** or **Route**
  - If you select Line or Pool, enter the line or line pool number
- to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant** and select a Greeting Table from the list box, or None if you want the to call transfer to the default Automated Attendant prompt.
- to transfer the call to an operator select **Transfer to Operator**
- to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list box select the number of the CCR Tree you want to transfer the call to

Note: You or the System Administrator must set up a CCR Tree before you can select it. For information about setting up a CCR Tree, see the *CallPilot Manager Set Up and Operation Guide (NN40090-300).*

10 Click **Submit**.

Moving an Intelligent Overflow rule

After you create an Intelligent Overflow rule, you can move it to another location in the Overflow Rule Table. Intelligent Overflow rules are applied to calls in the order that the rules appear in the Overflow Rule Table.

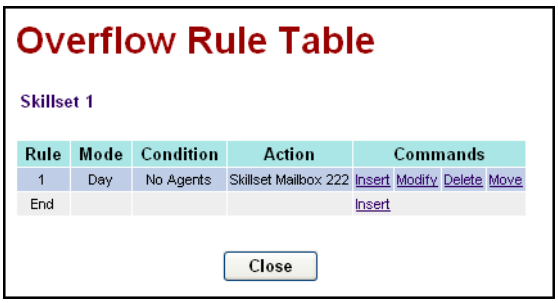
To move an Intelligent Overflow rule

1 Start CallPilot Manager.

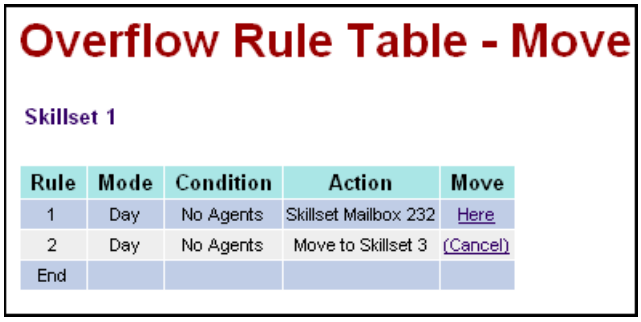
2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Overflow** link for the skillset that has the rule you want to move.
The Overflow Rule Table page appears.



5 Click the **Move** link for the rule you want to move.
The Overflow Rule Table - Move page appears.



6 Click the **Here** link for the location you want to move the rule to.
The Overflow Rule Table page shows the rule in its new location.

7 Click **Close**.

To modify an Intelligent Overflow Rule

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 If the Skillset is Enabled, click the Disable link.
Click **OK** to confirm.

5 Click the **Overflow** link for the skillset with the rule you want to modify.
The Overflow Rule Table page appears.

6 Click the **Modify** link for the rule you want to modify.
The Overflow Rule page appears.

7 Change the mode, conditions or actions for the rule.

8 Click **Submit**.
The modified rule appears in the Overflow Rule Table page.

9 Click the Enable link.
Click **OK** to confirm.

10 Click **Close**.

To delete an Intelligent Overflow Rule

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Overflow** link for the skillset with the rule you want to delete.
The Overflow Rule Table page appears.

5 Click the **Delete** link for the rule you want to delete.
A message appears that asks you to confirm the deletion.

6 Click **OK**.
The rule is deleted from the Overflow Rule Table page.

7 Click **Close**.

Chapter 10
Setting up Routing Tables

About Routing Tables

Routing tables determine how the system answers, holds and routes incoming calls to agents in your contact center. You set up routing tables to handle incoming calls for each skillset. A call in a skillset receives the treatment specified by the routing table. The treatment can be a combination of greetings, transfers, distribution, and being on hold. If an agent becomes available, the call is sent to the available agent.

Each skillset has a Day and a Night Routing Table. Set up the Day Routing Table for your business hours. Set up the Night Routing Table for your non-business hours.

The maximum number of steps you can add to a routing table is 20.

You can record the routing table steps you create in "Routing Tables" on page 243.

Fax Detection

Contact Center can detect fax calls and route them to a skillset mailbox. If you want Contact Center to detect incoming faxes, you must make your first routing table step:

- a Greeting step
- with Forced Play
- without a transfer
- with a greeting that is a minimum of 11 seconds long

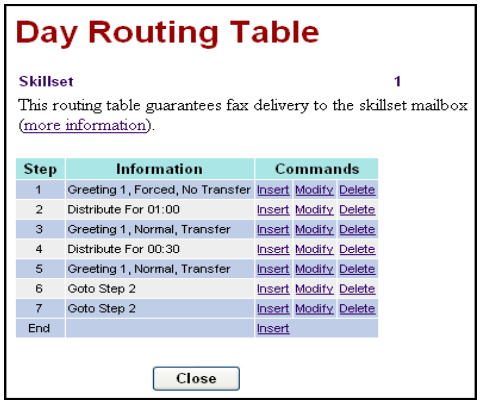
Fax Detection applies only if a fax machine is attempting to transmit a fax at the start of a greeting. If a fax transmission starts several seconds after the start of a greeting, it is possible for the fax tone not to be detected.

If you do not set up the routing table so it detects a fax call, some fax calls can be routed to agents, and some fax calls can be routed to the routing table's skillset mailbox.

To enable a routing table to detect fax calls, change the first step.

If you have a Business Communications Manager system and use Expected Wait Time, all greetings in the EWT table must be greater than 11 seconds to support fax detection.

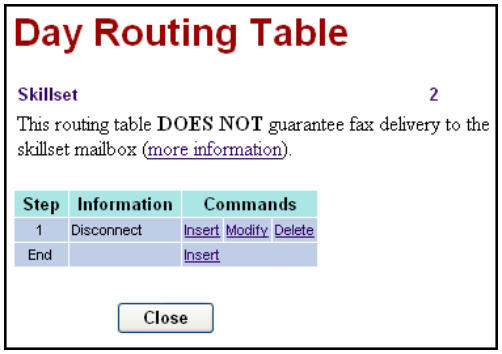
As you create routing tables, each table shows whether it detects faxes.



This routing table detects fax calls.

Its first step is a Greeting step:

- that is 11 seconds or longer
- that is Forced Play
- that does not have a transfer



This routing table does not guarantee fax detection.

Expected Wait Time

Expected Wait Time (EWT) is a greeting step that plays an expected wait time greeting to the caller. With EWT you can play a greeting based on the expected wait time of the call in a skillset. If you use Multimedia Contact Center, the expected wait time is displayed in the caller's browser.

Each EWT greeting table can contain up to 11 greetings. Up to 10 of these are wait time intervals that you define with greetings for the expected wait time. The last greeting is a general greeting that can cover any wait time situation. This is the greeting that plays when there are no wait time intervals defined or if the EWT exceeds all the configured wait time intervals.

The number of EWT Tables you can create depends on the BCM system you have. EWT is computed based on the following factors:

- Average call duration: the time when a caller is on the phone with an agent. This is an average for a predefined number of calls, based on the settings for the skillset.
- Number of higher priority calls ahead of the caller in all the skillsets that the same agents are assigned to.
- Number of agents in a skillset
- Availability of agents for a skillset's calls

To set up EWT

1. Record EWT Greetings.
   Refer to "Recording EWT greetings" on page 133.
2. Set up the EWT Table.
   Refer to "To set up an EWT Table" on page 134.
3. Create a Greeting step that uses an EWT Table.
   Refer to "Adding a Greeting step" on page 139.
4. Set the EWT parameters.
   Refer to "Setting up or changing a skillset" on page 56.

Recording EWT greetings

The first step in setting up an EWT Table is recording EWT greetings. EWT greetings notify callers of their expected wait time in a skillset. Refer to "Recording a Contact Center greeting" on page 112.

The following table lists examples of EWT greetings.

Greeting 100	*Based on the current volume of calls, the next agent will be available in a minimum of two minutes.*
Greeting 101	*The expected wait time for your call is approximately three minutes.*
Greeting 102	*We're experiencing higher than normal call volumes. You will be waiting approximately five minutes.*
Greeting 103	*The expected wait time for your call is approximately ten minutes.*
Greeting 150	*Thank you for continuing to hold. We are experiencing high call volumes. Please stay on the line and your call will be answered by the next available agent.*

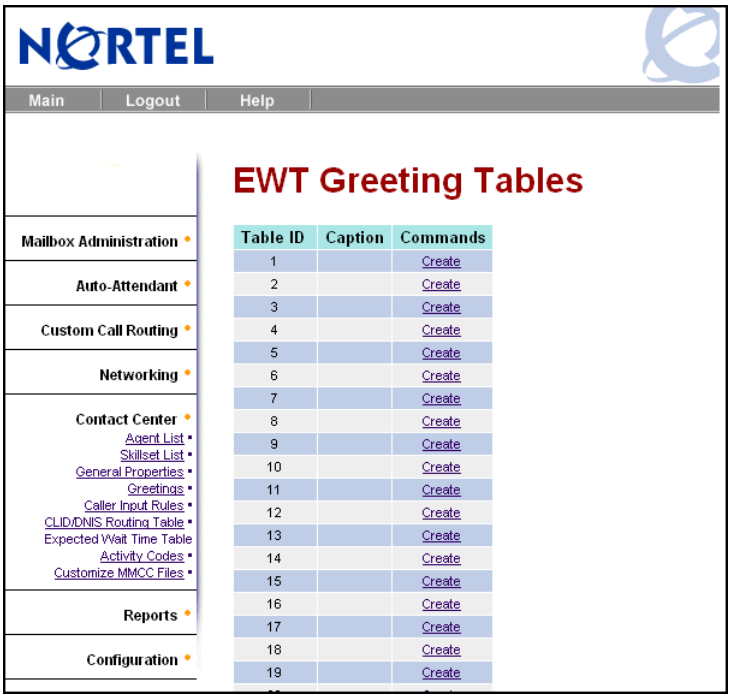
In these examples, greetings 100–103 are wait time intervals.
Greeting 150 is the last greeting in the table that covers any wait time situation.

All of the options available for a normal Greeting Step are available for the EWT greeting, such as Forced Play and Basic and Advanced Intelligent Caller Input Routing. Callers can interrupt an EWT greeting the same way they interrupt a normal greeting.

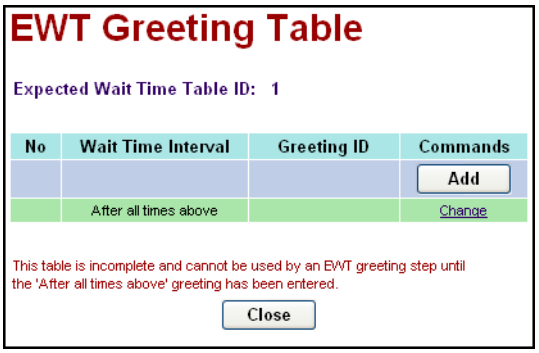
To set up an EWT Table

1 Click the **Contact Center** heading.

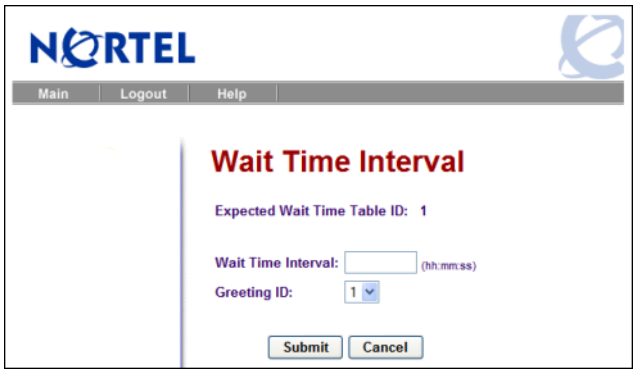
2 Click the **Expected Wait Time Tables** link.
The EWT Greeting Tables page appears. You can create a maximum of 20 EWT Greeting Tables.



3 Click the **Create** link.
The EWT Greeting Table page appears.



4 Click **Add**.
The Wait Time Interval page appears.



5 In the **Wait Time Interval** box enter the first EWT value in the format hh:mm:ss where:

- hh is number of hours from 0 – 24
- mm is number of minutes from 0 – 59
- ss is number of seconds from 0 – 59

Each EWT table has a maximum of eleven entries: 10 wait time intervals and 11 greeting numbers. You enter a wait time and choose a greeting that plays during the wait time. Greetings must be recorded before you can select them for an EWT interval.

6 From the **Greeting ID** list select the greeting you want to use for this EWT.

7 Click **Submit**.
The EWT Greeting Table page appears.

8 At the bottom of the table, click the **Change** link for **After all times above**.
The After all times above page appears.

9 From the **Greeting ID** list select the greeting you want to use if the EWT exceeds the configured wait time intervals.

Note: The after all the times above value is mandatory. You must enter a value for the greeting that plays if the EWT exceeds the configured wait time intervals.

10 Click **Submit**.
The EWT Greeting Tables page appears.

11 Click **Close**.
The EWT Greeting Tables page appears.

12 To enter a caption for the table, click the Add Caption link.
The EWT Table Caption page appears.

13 In the EWT Table box type a descriptive name for the table, for example *Peak Hours*.
The caption can be a maximum of 30 characters.

Note: If you want to change the Greeting Caption, click the Change Caption link and make your changes.

14 Click **Submit**.

You can now use this EWT Table in a Greeting step of a Day or Night routing table.
To add a Greeting step, see "Adding a Greeting step" on page 139.

To delete an EWT Table

Before you can delete an EWT Table that is used by a routing table you must disable the skillset that uses the EWT Table. If you want to delete an EWT Table that is not referenced by a skillset, start at step 10.

1 Click the **Contact Center** heading.

2 Click the **Skillset List** link.
The Skillset List page appears.

3 Click the **Disable** link for the skillset you want to disable.
A message appears that asks you to confirm the request to disable the skillset.

4 Click **OK**.
On the Skillset List page in the Status column the skillset changes from Enabled to Disabled.

5 Click the **Day** or the **Night** link for the skillset with the EWT Table you want to delete.
The Day or the Night Routing Table page appears for the skillset.

6 Click the **Modify** link for the Greeting step that contains the EWT Table.
The Routing Step page appears.

7 Make the changes you want to the Greeting step so that it does not reference the EWT Table you want to delete.

8 Click **Submit**.
The changed step appears in the Routing Table list.

9 Click **Close** to return to the Skillset List page.

10 Click the **Expected Wait Time Table** link.
The EWT Greeting Tables page appears.

11 Click the **Delete** link for the EWT Table you want to delete.
A message appears that asks you to confirm the deletion.

12 Click **OK**.

Note: When you delete an EWT Table, you delete its contents. The number of EWT Tables does not decrease. Your EWT greetings are not be deleted when you delete an EWT Table.

To change an EWT Table

1. Click the **Expected Wait Time Table** link.
   The EWT Greeting Tables page appears.
2. Click the **Change** link for the table you want to change.
   The EWT Greeting Table page appears.
3. Click the **Change** link for the EWT rule you want to change.
   The Wait Time Interval page appears.
4. Modify the Wait Time Interval or select a different greeting.
5. Click **Submit**.
   The changed EWT rule appears in the EWT Table.

About types of Routing Table steps

You can add these types of steps to routing tables:

Greeting	A Greeting step plays a greeting to callers waiting in a skillset. You assign greeting parameters to each greeting. After the greeting plays, the call goes to the next routing step. If there is no next step, the call ends. An EWT Greeting step uses the EWT Table you select to play estimated wait time messages to callers. EWT greeting steps act the same as greeting steps.
Distribute for	During a Distribute for step, calls wait to be distributed to agents. If no agents are available before the distribution time expires, the call goes to the next step in the routing table. If there is no next step set up in the routing table, the call ends. The minimum distribution time is zero and the maximum distribution time is 59 minutes and 59 seconds. The default distribution time is 30 seconds.
Goto	A Goto step is the last step in a routing table. A Goto step moves the caller to an earlier routing step. For example, if a Goto step points to step 1, the call goes back to step 1 and repeats the steps. The steps are repeated until an agent becomes available or the caller leaves a message in the skillset mailbox. The first step in a routing table cannot be a Goto step because there are no possible target steps yet. A Goto step cannot point to itself.

Transfer	A Transfer step can transfer calls to: • an extension • a mailbox • an external number • the Automated Attendant • an operator • a CCR Tree
Disconnect	A Disconnect step releases calls from the skillset. If the first step in a routing table is a Disconnect, Contact Center does not answer the call.

Greeting step parameters

You can assign these parameters to greeting steps. If the first step in a routing table is a Greeting step, it can detect fax calls and route them to the skillset mailbox for the routing table. For more information, see "Fax Detection" on page 131.

Forced Play	Enable Forced Play for a greeting that contains important information that you want callers to hear. If an agent becomes available while a caller is listening to a Forced greeting, the greeting is not interrupted. The caller must listen to the entire greeting. If you do not enable Forced Play, when an agent becomes available the greeting is interrupted and the call goes to the available agent. Limit the number of Forced Play greetings and keep Forced Play greetings as short as possible. Long Forced Play greetings increase the transfer time of calls to agents and cause unpredictable increases in distribution times. For more information, see "Routing Table administration" on page 204.
Intelligent Caller Input Routing, Basic	While the greeting plays callers can: • press 1 to transfer to the Automated Attendant • press 0 to transfer to the Operator • press 9 to leave a message in the skillset mailbox • press 2 to transfer to a CCR Tree These are the default keypad buttons. You can change the keypad buttons. Ensure that the Non-business hours greetings have Intelligent Call Input Routing, Basic enabled so that callers can direct how they transfer their calls.

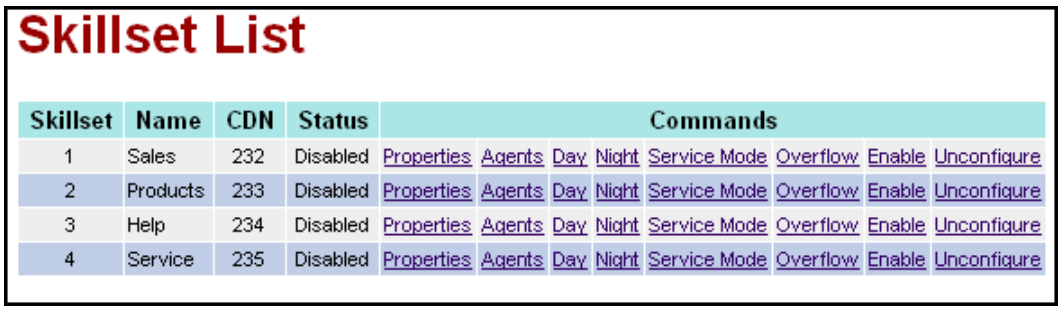
Intelligent Caller Input Routing, Advanced	Intelligent Caller Input Routing, Advanced uses the Caller Input Rules you create to change the priority and route calls to other skillsets or locations, based on caller multidigit DTMF input. Callers enter a sequence of DTMF digits such as a charge card number or passcode. The caller input is used to determine call treatment. Based on the caller input, the call can change in priority and/or be routed to: • the Automated Attendant • the Operator • the skillset mailbox • a CCR Tree • a mailbox • an extension • an external number • another skillset Intelligent Caller Input Routing, Advanced parameters: • Retries is 0-5, default is 2. This is the number of times a Data Entry step repeats itself on a caller entry error. • Number of Caller Input Rule tables is equal to the number of available skillsets.
No Intelligent Caller Input Routing	While the greeting plays callers cannot press a dialpad button to transfer their call. Contact Center ignores buttons pressed on the dialpad. The greeting plays without interruption. This is the default setting. At the end of the greeting, the caller goes to the next routing step. If there is no next step, the call ends.

Adding a Greeting step

Greeting steps play a message to waiting callers.

To add a Greeting step

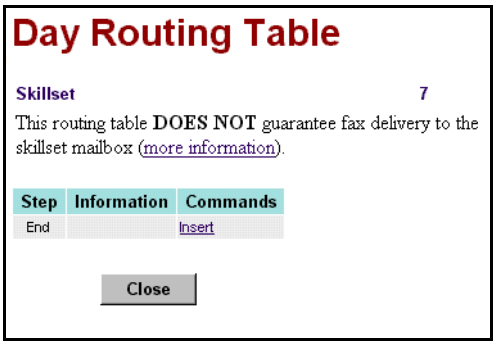
1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** link.
   The Skillsets List page appears.



Skillset List

Skillset	Name	CDN	Status	Commands							
1	Sales	232	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
2	Products	233	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
3	Help	234	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
4	Service	235	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure

4 Click the **Day** or the **Night** link for the skillset to which you want to add a greeting step.
The Day or the Night Routing Table page appears.



5 Click the **Insert** link.
The Routing Step page appears.

6 At the **Step Type** option, from the **Greeting** list select the greeting you want to use
or
if you want to use Expected Wait Time greetings, select **EWT Greeting Table** and from the list select the EWT Table you want to use.
If you have entered a greeting caption for the greeting or the EWT Greeting Table, the caption name appears.

7 If you want the caller to listen to the entire message before they transfer to an agent, select the **Forced Play** check box.

8 At the **Intelligent Caller Input Routing** option, select how you want callers to be able to transfer their calls:

- Select **None** if you do not want callers to be able to transfer their calls.

- Select **Basic** if you want callers to be able to transfer to the Automated Attendant, operator, skillset mailbox or a CCR Tree. Select the transfers available to callers:
  - — Select the **Auto Attendant** check box if you want callers to be able to transfer to the Automated Attendant. By default callers press 1 to transfer to the Automated Attendant. and select a Greeting Table to transfer the call to, or select None to transfer the call to the default Auto Attendant prompt. You can assign a different dialpad button by selecting a number from the list box.
  - — Select the **Operator** check box if you want callers to be able to transfer to the Operator. By default callers press 0 to transfer to the Operator. You can assign a different dialpad button by selecting a number from the list box.
  - — Select the **Skillset Mailbox** check box if you want callers to be able to transfer to the skillset mailbox. By default callers press 9 to transfer to the skillset mailbox. You can assign a different dialpad button by selecting a number from the list box.

— Select the **CCR** check box if you want callers to be able to transfer to a CCR Tree. By default callers press 2 to transfer to a CCR Tree. You can assign a different dialpad button by selecting a number from the list box. From the **Tree** list box select the CCR Tree you want callers to transfer to.

Note: You or the System Administrator must set up a CCR Tree before you can select it. For information about setting up a CCR Tree, see the *CallPilot Manager Set Up and Operation Guide (NN40090-300).*

- Select **Advanced** if you want callers to be able to enter multiple digits such as a passcode or a credit card number. Advanced is available only if you use Contact Center Professional. Select the Advanced parameters:
  — From the **Retries** list box select the a number between 0 and 5.
  The default is 2. This is the number of times a Data Entry step repeats itself on a caller entry error.
  — From the **Caller Input Rules Table** list box select a table. This is the rules table used for processing this route step.
  You must have created rules in the Caller Input Rules Table. For more information, see "To create a Caller Input Rule" on page 153.

9 Click **Submit**.
The Greeting step appears in the Routing Table list.

10 Click **Close** to return to the Skillset list.

Adding a Distribute for step

Distribute for steps put callers on hold while they wait for an agent.

To add a Distribute for step

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Day** or the **Night** link for the skillset you want to add a distribution step to.
The Day or Night Routing Table page appears for the skillset.

5 Click the **Insert** link for the step you want to add a Distribute for step to.
The Routing Step page appears.

6 Click the **Distribute for** option.

7 In the **Distribute for** box enter the longest time in minutes and seconds that callers can wait on hold in this step.

8 Click **Submit**.
The Distribute For step appears in the Routing Table list.

9 Click **Close** to return to the Skillset list.

Adding a Goto step

Goto steps send a caller to another step in the routing table. You can add a Goto step only to the end of a routing table.

To add a Goto step

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Skillset** link.
The Skillset List page appears.

4 Click the **Day** or the **Night** link for the skillset you want to add a Goto step to.
The Day or the Night Routing Table page appears.

5 Click the **Insert** link for the step you want to add a Goto step to.
The Routing Step page appears.

6 Click the **Goto Step** option.

7 From the **Goto Step** list box select the number of the Routing Table step you want to send callers to.

8 Click Submit.
The Goto step appears in the Routing Table list.

9 Click **Close** to return to the Skillset List page.

Adding a Transfer step

Transfer steps send a caller to an extension, external number, mailbox, operator, Auto Attendant, or CCR Tree.

If you choose **Transfer to Auto Attendant** and have a CCR Tree assigned to the Auto Attendant Greeting Table, the call automatically transfers to the Home node of the CCR Tree. The Contact Center caller will not hear the Auto Attendant greeting.

If you want the caller to hear the Auto Attendant greeting when you choose **Transfer to Auto Attendant** as a step in the greeting table, select one of the following methods:

- Choose **Transfer to Auto Attendant** and set the CCR Tree to None in the Auto Attendant greeting table setup.
- Choose **Transfer to Auto Attendant** and assign a CCR Tree to the Auto Attendant greeting table. Record the prompt of the CCR Tree Home node so it is the same as the Auto Attendant company greeting that is skipped when the caller is transferred to Auto Attendant.
- Insert a Contact Center greeting step right before the **Transfer to Auto Attendant** step in the skillset routing table. This Contact Center greeting would be recorded the same as the Auto Attendant company greeting.

- Create a specific Auto Attendant table and CCR tree for Contact Center callers that transfer to Auto Attendant.

To add a Transfer step

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Day** or the **Night** link for the skillset you want to add a Transfer step to.
   The Day or the Night Routing Table page appears.
5. Click the **Insert** link for the step you want to add a Transfer step to.
   The Routing Step page appears.
6. Select where you want to transfer the call to:
   - if you want to transfer the call to an extension, select **Transfer to Extension** and enter the extension
   - if you want to transfer the call to a mailbox, select **Transfer to mailbox** and enter the mailbox number
   - if you want to transfer the call to an external number:
     — select **Transfer to external** and enter the external number
     — from the **Outdial Method** list box select **Line**, **Pool** or **Route**
     — if you select Line or Pool, in the **Line/Pool#** box enter the line or line pool number
   - if you want to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant**. From the list box you can select the Greeting Table you want to transfer calls to, or None.
   - if you want to transfer the call to the operator, select **Transfer to Operator**
   - if you want to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list box select the number of the CCR Tree you want to transfer the call to.

   Note: You or the System Administrator must set up a CCR Tree before you can select it. For information about setting up a CCR Tree, see the *CallPilot Manager Set Up and Operation Guide (NN40090-300).*

7. Click **Submit**.
   The Transfer step appears in the Routing Table list.
8. Click **Close** to return to the Skillset list.

Adding a Disconnect step

Disconnect steps release a call from the skillset it is in. If the first step in a routing table is a Disconnect step, Contact Center does not answer the call.

To add a Disconnect step

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** link.
   The Skillsets List page appears.
4. Click the **Day** or the **Night** link for the skillset you want to add a disconnect step to.
   The Day or the Night Routing Table page appears.
5. Click the **Insert** link for a step in the routing table.
   The disconnect step is added before this step. To add the disconnect step to the end of the routing table, click the **Insert** link for the End step. If the Routing Table is full the End step does not appear.
   The Routing Step page appears.
6. Click the **Disconnect** option.
7. Click **Submit**.
   The Disconnect step appears in the Routing Table list.
8. Click **Close** to return to the Skillset List page.

Assigning Routing Table hours of operation

To assign the routing table hours of operation for each day of the week, you set the start times for the Day and Night Routing Tables for each skillset. The start times determine which routing table is used for the skillset.

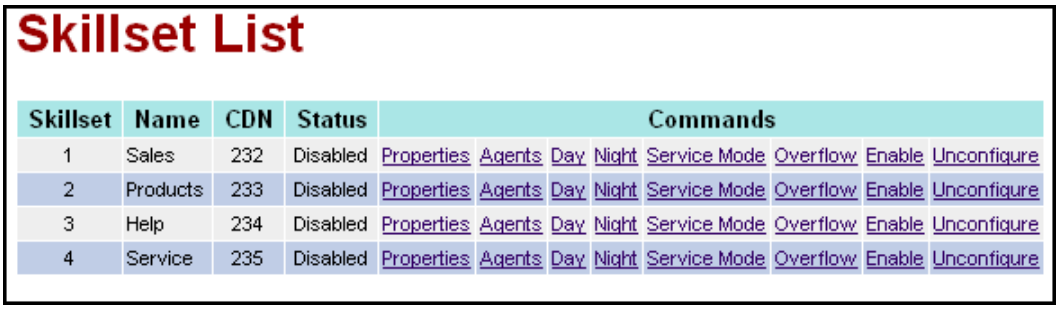
You can also leave the default as 24 hour operation. If you select 24 hour operation, the skillset uses the Day Routing Table only for that day.

To assign hours of operation to a skillset

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

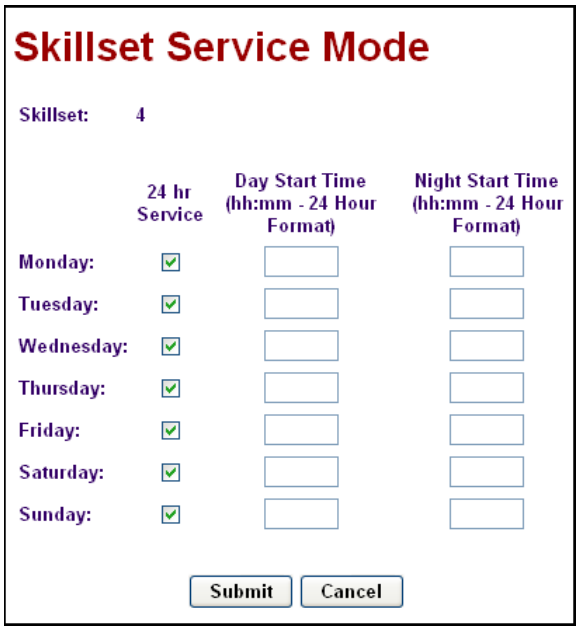
3 Click the **Skillset List** link.
The Skillset List page appears.



Skillset List

Skillset	Name	CDN	Status	Commands							
1	Sales	232	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
2	Products	233	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
3	Help	234	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
4	Service	235	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure

4 Click the **Service Mode** link for the skillset you want to set up.
The Skillset Service Mode page appears.



Skillset Service Mode

Skillset: 4

	24 hr Service	Day Start Time (hh:mm - 24 Hour Format)	Night Start Time (hh:mm - 24 Hour Format)
Monday:	☑		
Tuesday:	☑		
Wednesday:	☑		
Thursday:	☑		
Friday:	☑		
Saturday:	☑		
Sunday:	☑		

Submit Cancel

5 For each day of the week set the hours of operation for the skillset:

- to have the skillset operate in 24 hour mode, leave the **24 hr Service** check box selected for that day
- to set the start time for the Day Routing Table, in the **Day Start Time** box enter the start time in 24 hour format
- to set the start time for the Night Routing Table, in the **Night Start Time** box enter the start time in 24 hour format

6 Click **Submit**.

Setting the Service Mode for skillsets

You must set the Service Mode the skillset uses so that calls are answered correctly.

Before you set the Service Mode you must:

- configure a skillset
- set up at least a Day Routing Table for the skillset

The default Contact Center Service Mode is 24 hour operation. You can change the hours of operation using the Operator Feature Code ([*] [9] [8] [2]). There are six possible Service Modes:

Auto	The skillset uses the Automatic Service Mode. You must configure both the Day and Night Routing Tables before you can assign the Auto Service Mode to the skillset.
Day	The skillset uses the Auto Service mode and the Day Routing Table. You must configure the Day Routing Table before you can assign the Auto Service Mode and the Day Routing Table.
Night	The skillset uses the Manual Service mode and the Night Routing Table. You must configure the Night Routing Table before you can assign the Auto Service Mode and the Night Routing Table.
24 Hour	The skillset uses the Day Routing Table only. You must configure the Day Routing Table for 24 hour operation to use this Service Mode.
Uninit	The skillset is not configured. You must configure the skillset before you can assign a Service Mode.
Invalid	You have only partially configured the skillset. You cannot enable this skillset.

Note: If you originally configure the skillset with a Day Routing Table only and enable the skillset, Contact Center will recognize the Service Mode as Day. Afterwards, if you and add a Night Routing Table, Contact Center still recognizes the Service Mode as Day. You must set the Service Mode to Auto to get Contact Center to function in the Auto Service Mode.

To set the Service Mode for a skillset

```
Pswd:
RETRY          OK
```

1 Press [⚙] [9] [8] [2].
Enter the default Operator password [6] [7] [3] [7] [2] [8] [6] [7], (Operator) and press OK
or
if you changed the default Operator password, enter the new password and press OK.

```
Choose option
OPER
```

2 Press MODE.

```
CC Service
```

3 This display appears briefly.

```
Mode 1: Auto
CHNG     VIEW
```

4 The display shows the Service Mode for skillset 1.
In this example, skillset 1 is in Auto mode.
Press CHNG if you want to change the Service Mode to Day or Night
or
press VIEW if you want to view the details for the Service Mode
or
press NEXT if you have a Day Routing Table for skillset 2.

```
Mode 2: Day
CHNG          NEXT
```

5 The display shows the Service Mode for skillset 2.
In this example, skillset 2 is in Day mode.
Press CHNG if you want to change the Service Mode to Day or Night
or
press NEXT to view the next skillset.

While you view the skillsets, you can press:

- [1] and then enter the skillset number to view a specific skillset.
  - — If you want to view a skillset from 1 - 9, enter the skillset number and then press OK.
  - — If you want to view a skillset from 10 - 50, just enter the number of the skillset.
  - — If you want to return to the previous display press QUIT.
  - — If you want to re-enter the skillset number, press RETRY.
- [4] to view the previous skillset.
- [3], [6], [#] or NEXT to view the next skillset
- [*] to exit

6 The session ends when you press [*] or [☎].

Note: Remember to manually choose the Day Routing Table or the Auto Service Mode when your business returns to regular hours.

Example of a Day Routing Table

To set up the routing table steps is shown in "Example of Day Routing Table steps", follow the procedure "To set up the Day Routing Table example".

Example of Day Routing Table steps

Step number	Type of step	Step parameters
1	Greeting	Greeting 1, information greeting Forced Transfer none enabled
2	Distribute for	1:00 (one minute)
3	Greeting	Greeting 2, general company greeting Not forced play Intelligent Call Input Routing, Basic with defaults
4	Distribute for	Accept default - distribute for 00:30 (thirty seconds)
5	Greeting	Greeting 3, please wait greeting Not forced play Intelligent Call Input Routing, Basic with operator default
6	Goto	Routing Table step 2

To set up the Day Routing Table example

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** link.
   The Skillset List link appears.
4. Click the **Day** link for Skillset 1.
   The Day Routing Table page appears.
5. Click the **Insert** link.
   The Routing Step page appears.
   Greeting 1 is assigned by default.
6. Select the **Forced Play** check box.
7. At the **Intelligent Caller Input Routing** option select **None**.

8 Click **Submit**.
The Greeting step appears as step 1 in the Day Routing Table list.

9 Click the **Insert** link for the **End** step.
The Routing Step page appears.

10 Click the **Distribute for** option.

11 In the **Distribute for** box enter the time **01:00**.

12 Click **Submit**.
The Distribute For step appears as step 2 in the Day Routing Table list.

13 Click the **Insert** link for the **End** step.
The Routing Step page appears.
The Greeting option is selected by default.

14 In the **Greeting** box type **2**.

15 At the **Intelligent Caller Input Routing** option, select **Basic**.
The Auto-Attendant, Operator, Skillset Mailbox and CCR check boxes are selected by default.
The default DTMF digits for each destination are shown.

16 Click **Submit**.
The Greeting step appears as step 3 in the Day Routing Table page.

17 Click the **Insert** link for the **End** step.
The Routing Step page appears.

18 Select the **Distribute for** option.
The default time of 00:30 is shown in the Distribute for box.

19 Click **Submit**.
The Distribute for step appears as step 4 in the Day Routing Table list.

20 Click the **Insert** link for the **End** step.
The Routing Step page appears.
Greeting is selected by default.

21 In the **Greeting** box type **3**.

22 At the **Intelligent Caller Input Routing** option select **Basic**.

23 Clear the **Auto-Attendant**, **Skillset Mailbox** and **CCR** check boxes so that just the **Operator** check box is selected.

24 Click **Submit**.
The Greeting step appears as step 6 in the Day Routing Table list.

25 Click the **Insert** link of the **End** step.
The Routing Step page appears.

26 Select the **Goto step** option.

27 From the **Goto step** list box select **2**.

28 Click **Submit**.
The Goto step appears as step 6 in the Day Routing Table list.

29 Click **Close** to return to the Skillset List page.

Example of a Night Routing Table

To set up the routing table steps shown in "Example of Night Routing Table steps", follow the procedure "To set up the Night Routing Table example".

Example of Night Routing Table steps

Step number	Type of step	Step parameters
1	Greeting	Greeting 6, non-business hours greeting Not forced play Intelligent Call Input Routing, Basic
2	Disconnect	There are no parameters for the Disconnect option.

To set up the Night Routing Table example

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Night** link for Skillset 1.
The Night Routing Table page appears.

5 Click the **Insert** link.
The Routing Step page appears.
The **Greeting** option is selected by default.

6 In the **Greeting** box, type **6**.

7 At the **Intelligent Caller Input Routing** option, select **Basic.**

8 Click **Submit**.
The Greeting step appears as step 1 in the Night Routing Table list.

9 Click the **Insert** link for the **End** step.
The Routing Step page appears.

10 Select the **Disconnect** option.

11 Click **Submit**.
The Disconnect step appears as step 2 in the Night Routing Table list.

12 Click **Close** to return to the Skillset List page.

Changing a Routing Table

You must disable a skillset before you can change its routing table.
For how to disable a skillset see "Disabling a skillset" on page 67.

To	Follow the procedure
Insert steps	"Adding a Greeting step" on page 139 "Adding a Distribute for step" on page 141 "Adding a Goto step" on page 142 "Adding a Transfer step" on page 142 "Adding a Disconnect step" on page 143
Review steps	"To review Routing Table steps" on page 151
Modify steps	"To modify Routing Table steps" on page 151
Delete steps	"To delete Routing Table steps" on page 152

To review Routing Table steps

You can review the steps for enabled skillsets.

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Day** or **Night** link for the skillset whose routing table steps you want to review.
   The Day or Night Routing Table page appears.
5. Click the **View** link to view the steps.
6. After you review the steps, **Click** Close.

To modify Routing Table steps

You must disable a skillset before you can modify its routing table steps.
To disable a skillset, see "Disabling a skillset" on page 67.

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Skillset List** heading.
   The Skillset List page appears.
4. Click the **Day** or the **Night** link for the skillset with the routing table you want to change.
   The Day or the Night Routing Table page appears for the skillset.

5 Click the **Modify** link for the step you want to change.
The Routing Step page appears.

6 Make the changes you want to the routing table step.

7 Click **Submit**.
The changed step appears in the Routing Table list.

8 Click **Close** to return to the Skillset List page.

To delete Routing Table steps

You must disable a skillset before you can delete its routing table steps.
To disable a skillset, see "Disabling a skillset" on page 67.

1 Start CallPilot Manager.

2 Click the **Contact Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Day** or the **Night** link for the skillset with the step you want to delete.
The Day or the Night Routing Table page appears for the skillset.

5 Click the **Delete** link for the step you want to delete.
A message appears that asks you to confirm the deletion.

6 Click **OK**.
The step is deleted from the Routing Table list.

7 Click **Close** to return to the Skillset List page.sss

Chapter 11
Creating Caller Input Rules

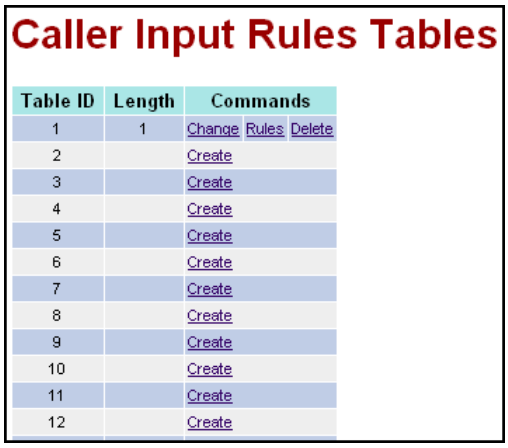
You can create Caller Input Rules that route calls to other skillsets or locations based on caller multidigit DTMF input. Caller Input Rules let you identify callers depending on what kind of services available on your contact center. For example, callers can enter a passcode to access a special service line. Refer to "An example of using Intelligent Caller Routing, Advanced" on page 157 for information regarding how to use Caller Input Rules in your contact center.

You have 50 Caller Input Tables. You can create up to 2 000 Caller Input Rules for each table. Each rule has a Match String and an Action. The Match String is the string of digits that is checked, and the Action is the routing applied to calls that match the rule. The list of Caller Input Rules is sorted numerically by Match String. If strings overlap, longer, more specific strings appear before shorter, less specific strings.

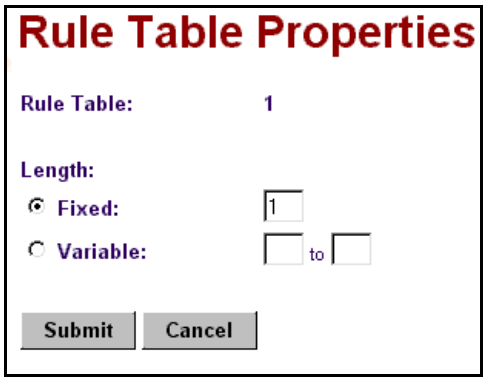
Note: When you record the greetings you want to use for Caller Input, include that the caller must press [#] after they enter their input. For example, *"If you have a personal identification number, please enter it now, followed by the # key."*

To create a Caller Input Rule

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Caller Input Rules** link.
   The Caller Input Rules Tables page appears.



4 Click the **Create** link for the Caller Input Rules Table you want to add a rule to.
The Rule Table Properties page appears.

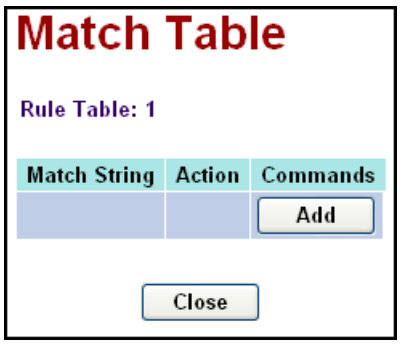


5 Select **Fixed** or **Variable**, depending on whether you want to create a rule that applies to a dialstring of a fixed or variable length:

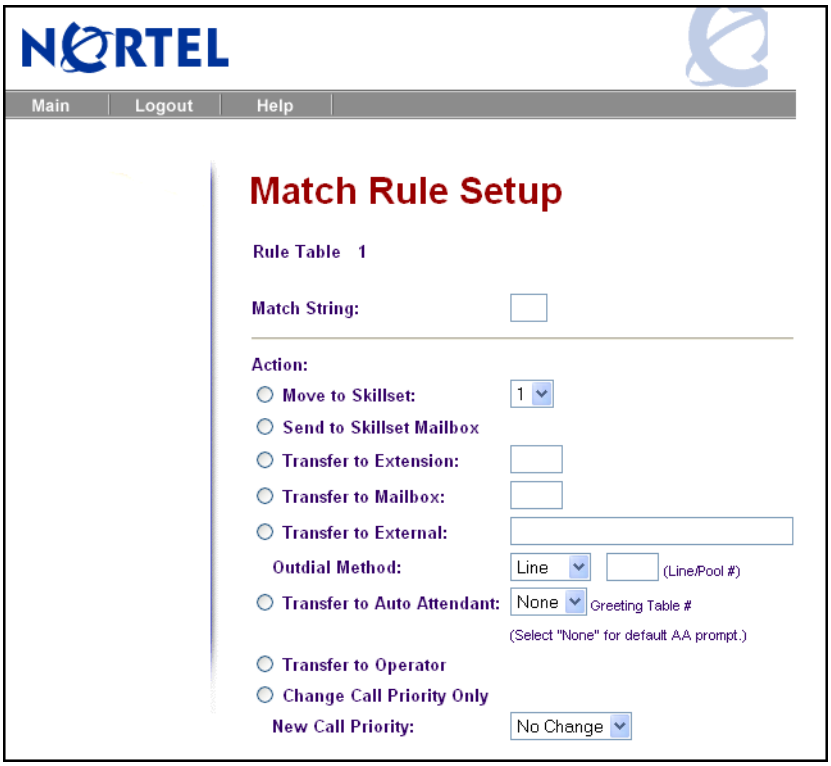
- If you select **Fixed**, in the **Fixed** box enter the number of digits allowed.
  The fixed length can be from 1 to 50 digits.
- If you select **Variable**, in the **Variable** boxes type the minimum to the maximum range of caller input digits. The minimum value must be 1 or greater. The maximum value must be anything greater than the minimum value, up to 50.

6 Click **Submit**.
You return to the Caller Input Rules Tables page.

7 Click the **Rules** link for the table you want to create a rule for.
The Match Table page appears.



8 Click **Add**.
The Match Rule Setup page appears.



9 In the **Match String** box type the string you want to match.
You can use # and * as wildcard characters.
For information about using wildcard characters, see "Using wildcard characters" on page 156.

10 Select an action for how you want to route the call:

- if you want to transfer the call to another skillset:
  - select **Move to Skillset**
  - from the list box select the number of the skillset you want to transfer the call to.
  - if you want to change the priority of the call, select a number between 1 and 20 from the **New Call Priority** list box. The default is 10.
- if you want to transfer the call to the skillset mailbox, select **Send to Skillset Mailbox**
- if you want to transfer the call to an extension, select **Transfer to Extension** and in the box type the extension number you want to transfer the call to
- if you want to transfer the call to a mailbox, select **Transfer to Mailbox** and in the box type the mailbox number you want to transfer the call to
- if you want to transfer the call to an external number:
  - select **Transfer to External**
  - in the box type the number you want to transfer the call to
  - from the **Outdial Method** list box select an outdial method

— if you select Line or Pool, in the **Line/Pool#** box type the line or line pool number used

- if you want to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant** and select a Greeting Table to transfer the call to, or select None to transfer the call to the default Auto Attendant prompt.
- if you want to transfer the call to the operator, select **Transfer to Operator**
- if you want to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list box select the number of the CCR Tree you want to transfer the call to

Note: You or the System Administrator must set up a CCR Tree before you can select it. For information about setting up a CCR Tree, see the *CallPilot Manager Set Up and Operation Guide* (NN40090-300).

- if you want the call to remain in its skillset but you want to change the call's priority within the skillset, select **Change Call Priority Only** and from the **New Call Priority** list box select a priority between 1 and 20 for the call. The default is 10.

11 Click **Submit**.
The rule you created appears in the Match Table.
Repeat steps 8 through 11 if you want to add another rule to the table
or
Click **Close** to return to the Caller Input Rules Tables page.

Using wildcard characters

You can use the wildcard characters # and * in the match string:

- # matches any single digit
- * matches zero or more digits

When you use the * wildcard character:

- it can appear only once in a match string
- it can appear only at the end of a match string
- it cannot be the only character in a match string

Some examples of using wildcard characters in the match string:

1111##	Matches all account numbers 111100 to 111199
########	Matches a credit card number with the correct number of digits
#*	Matches all valid input greater than 1 character

An example of using Intelligent Caller Routing, Advanced

The contact center of Bridgestone Computers uses Intelligent Caller Routing, Advanced and Caller Input Rules to give some callers access to a special service line. Bridgestone Computers uses Professional Contact Center, which gives them Intelligent Caller Routing, Advanced functionality.

Customers who purchase equipment that is under warranty have an eight-digit personal identification number. When they call Bridgestone Computers' service line and enter their personal identification number, their call receives priority handling in the contact center.

Here is how their call is handled:

1. The caller hears the greeting for the service line, which includes *"If you have a personal identification number, please enter it now, followed by the # key."*
2. The caller enters their personal identification number.
3. If the caller enters their number incorrectly, the greeting can be repeated as many as three times, which is the number of retries the Contact Center Administrator has set for Retries in Intelligent Caller Routing, Advanced.
4. If the caller enters their number correctly, Contact Center compares the caller's personal identification number with the Match String in the rules for Rules Table 1.
5. For Rules Table 1, the Contact Center Administrator created a rule of a fixed length of eight digits because all personal identification numbers are eight digits long.
6. The Contact Center Administrator created three rules for Rules Table 1:
   - rule 4709####. Customers with servers have a personal identification number that begins with 4709
   - rule 5709####. Customers with desktop computers have a personal identification number that begins with 5709
   - rule 6709####. Customers with laptop computers have a personal identification number that begins with 6709
7. The callers' personal identification number is 67095233, which matches the rule for laptop computers.
8. The Contact Center Administrator set up the rules in Rules Table 1 with these Actions:
   - a match for 4709#### sends callers to skillset 1 (servers) and changes the call priority to 1
   - a match for 5709#### sends callers to skillset 2 (desktops) and changes the call priority to 1
   - a match for 6709#### sends callers to skillset 3 (laptops) and changes the call priority to 1
9. The call enters skillset 3. Skillset 3 is the priority service skillset for laptops.

Changing a Caller Input rule

You can change a caller input rule at any time. If you want to change the length for the rules in a Caller Input table, see "To change the rule length for a Caller Input Table" on page 158. If you want to change a specific rule in a table, see "To change a Caller Input Rule" on page 158.

To change the rule length for a Caller Input Table

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Caller Input Rules** link.
   The Caller Input Rules Tables page appears.
4. Click the **Change** link for the table you want to change.
   The Rule Table Properties page appears.
5. Make the appropriate change to the length. Select **Fixed** or **Variable**, depending on whether you want to create a rule that applies to a dialstring of a fixed or variable length:
   - If you select **Fixed**, in the **Fixed** box enter the number of digits allowed.
     The fixed length can be from 1 to 50 digits.
   - If you select **Variable**, in the **Variable** boxes type the minimum to the maximum range of caller input digits. The minimum value must be 1 or greater. The maximum value must be anything greater than the minimum value, up to 50.
6. Click **Submit**.

To change a Caller Input Rule

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Caller Input Rules** link.
   The Caller Input Rules Tables page appears.
4. Click the **Rules** link for the table that has the rule you want to change.
   The Match Table page appears.
5. Click the **Change** link for the rule you want to change.
   The Match Rule Setup page appears.
6. Make the changes you require to the Match String or Action.
7. Click **Submit**.
   The Match Table page appears with the changed rule.
8. Click **Close** to return to the Caller Input Rules Tables page
   or
   repeat steps 5 through 7 to change another rule.

Deleting a Caller Input rule

You can delete a Caller Input rule at any time.

To delete a Caller Input rule

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Caller Input Rules** link.
   The Caller Input Rules Tables page appears.
4. Click the **Rules** link for the table with the rule you want to delete.
   The Match Table page appears.
5. Click the **Delete** link for the rule you want to delete.
   A message appears that asks you to confirm the deletion.
6. Click **OK**.
   The rule is deleted from the Match Table list.
7. Click **Close** to return to the Caller Input Rules Tables page.

Clearing a Caller Input Rule Table

If you clear a Caller Input Rule Table, you delete all the rules and rule length information from the table.

To clear a Caller Input Rule Table

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.
3. Click the **Caller Input Rules** link.
   The Caller Input Rules Tables page appears.
4. Click the **Clear** link for the table you want to clear.
   A message appears that asks you to confirm the deletion.
5. Click **OK**.

Chapter 12
Line administration

Before Contact Center can answer an incoming line, you must assign the line to be answered by a Contact Center skillset. Refer to "Intelligent Contact Center Capacities for BCM450" on page 16 and "Intelligent Contact Center Capacities for BCM50" on page 18 for information on how many lines you can configure for your contact center.

For each line that you want Contact Center to answer, you assign:

- the line to be answered by Contact Center
- the skillset that calls on this line go to
- the number of rings before the line is answered

You can record your line answering information in the table "Line answering" on page 246.

Setting the Answer Lines status

The Answer Lines status determines whether Contact Center answers the assigned lines. If the Answer Line status is set to Yes, Contact Center answers the lines assigned as Contact Center and CallPilot answers the lines assigned as AA. If the Answer Line status is set to No, neither Contact Center nor CallPilot answers lines.

To set the Answer Lines status

```
Pswd:
RETRY          OK
```

1 Press [9] [8] [2].
Enter the Operator password, and then press OK.

```
Choose option
OPER           MODE
```

2 Press OPER.

```
Atdt avail: N
CHNG           NEXT
```

3 Press NEXT

```
Business open: N
CHNG           NEXT
```

4 Press NEXT.

```
Answer lines? N
CHNG           NEXT
```

5 Press CHNG.
If you set Answer Lines to N the display shows `Disabling...`
If you set Answer Lines to Y the display shows `Enabling...`

6 Press [☎] to end the session.

Configuring lines

You must disable a skillset and wait until there are no calls in the skillset before you can add lines to it. You cannot add lines to a skillset while it is in use.

Lines that are programmed to be answered by Contact Center must not be programmed to be answered by another peripheral or application.

To delay calls being answered, you can assign Contact Center to answer incoming calls after a specified number of rings. The number of rings ranges from zero to 12. If you choose zero rings, the caller might hear one ring. Zero rings means the call is answered as soon as possible.

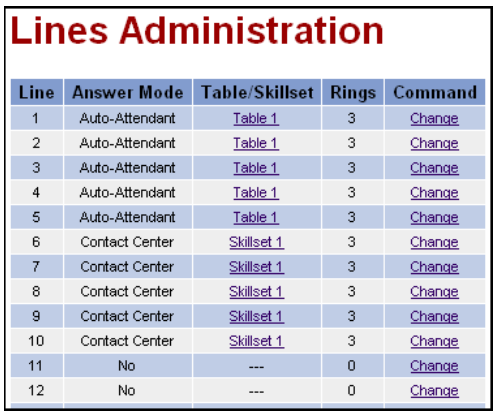
For lines equipped with Caller ID, you must set the number of rings to two or more. Caller ID information is not provided until just prior to the second ring, so if you set the number of rings to zero or one, Caller ID information is not relayed.

Long distance charges start when a call is answered by Contact Center. To minimize long distance charges, set the ring count higher than 0 so that calls spend more waiting time in a ringing state.

To configure a line

1 Start CallPilot Manager.

2 Click the **Auto-Attendant** heading.
The Lines Administration page appears.



Lines Administration

Line	Answer Mode	Table/Skillset	Rings	Command
1	Auto-Attendant	Table 1	3	Change
2	Auto-Attendant	Table 1	3	Change
3	Auto-Attendant	Table 1	3	Change
4	Auto-Attendant	Table 1	3	Change
5	Auto-Attendant	Table 1	3	Change
6	Contact Center	Skillset 1	3	Change
7	Contact Center	Skillset 1	3	Change
8	Contact Center	Skillset 1	3	Change
9	Contact Center	Skillset 1	3	Change
10	Contact Center	Skillset 1	3	Change
11	No	---	0	Change
12	No	---	0	Change

3 Click the **Change** link for the line you want to assign to a skillset.
The Line Properties page appears.

Line Properties

Line Number: 11
Answer Mode: Contact Center
Table/Skillset Number: 1
Number of Rings: 0

Submit Cancel

4 From the **Answer Mode** list box, select **Contact Center**.

5 In the **Table/Skillset Number** box type the number of the skillset you want to answer this line.

6 From the **Number of rings** box select the number of rings before Contact Center answers. You must select a number from 0 to 12.

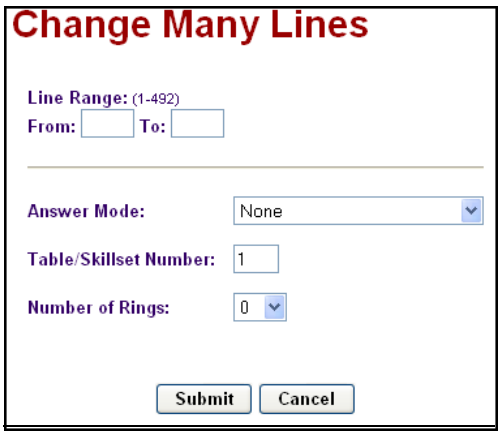
7 Click **Submit**.

To configure several lines

1 Start CallPilot Manager.

2 Click the **Auto-Attendant** heading.

3 Click the **Change Many Lines** link.
The Change Many Lines page appears.



4 In the **From** box type the number of the first line to add.

5 In the **To** box type the number of the last line to add.

6 From the **Answer Mode** list box select **Contact Center**.

7 In the **Table/Skillset Number** box type the number of the skillset you want to answer these lines.

8 From the **Number of rings** list box select the number of rings before Contact Center answers. You must select a number from 0 to 12.

9 Click **Submit**.

Chapter 13
Setting up Contact Center general properties

Setting up Contact Center includes assigning the language and setting up general Contact Center properties.

You can generate a System Configuration Report to see a snapshot of your Contact Center settings.

You can enable keycodes if you want to increase the number of agents at your contact center or enhance your contact center with options such as Multimedia Contact Center.

Assigning the Contact Center language

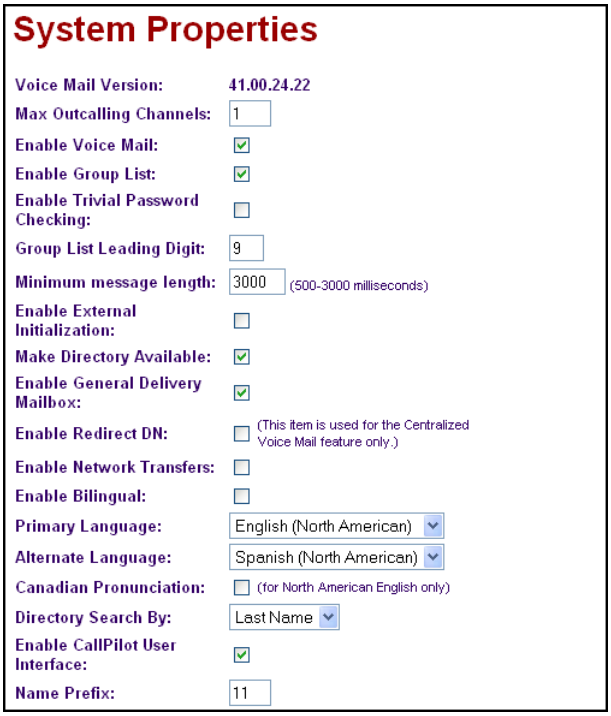
The languages available for Contact Center are the languages that are available for CallPilot. If you change the Contact Center language, you also change the CallPilot language.

To assign the Contact Center language

1 Start CallPilot Manager.

2 Click the **Configuration** heading.

3 Click the **System Properties** link.
The System Properties page appears.



4 If you want to use a Primary and an Alternate language, select the **Enable Bilingual** check box. If you clear this check box alternate language prompts are not available.
Disabling bilingual operation affects:

- language designations for Automated Attendant greetings
- voice prompt selections for callers who use the Automated Attendant
- voice prompt selections for callers who transfer to mailbox greetings

5 Select a primary language from the **Primary Language** list box.
Prompting for the Automated Attendant and CCR Trees occurs in this language.

6 Select an alternate language from the **Alternate Language** list box.
The alternate language cannot be the same as the primary language.

7 Select the **Canadian Pronunciation** check box if you want voice prompts that include the letter "z" to be pronounced "zed" instead of "zee". The Canadian Pronunciation check box appears only if North American English is the primary or alternate language.

8 Click **Submit**.

General Contact Center properties

When you set up Contact Center you must assign values for the general properties. The general Contact Center properties are:

MMCC Public Hostname

Note: The MMCC Public Hostname field appears only if Multimedia Contact Center is enabled.

The Multimedia Contact Center Public Hostname must be a fully qualified domain name (FQDN) or the IP address of the Business Communications Manager.

• If you have no firewall, or you use the Business Communications Manager as the firewall, enter the external IP address of your Business Communications Manager system.
• If you use a dedicated firewall/proxy server, enter its external IP address.

For more information about BCM, see the *Nortel Business Communication Manager 5.0 Configuration—Telephony*.

Reserved channels

Reserved channels are voice channels that are reserved for use by Contact Center. If you reserve channels you ensure that callers are played skillset greetings, and CallPilot does not use all of the voice channels.

A reserved channel is used when:

- a Contact Center greeting plays to a caller
- Off-premise Message Notification notifies you that there is a message in a skillset mailbox

Contact Center Reporting properties Address

The Contact Center Reporting properties let you control who can access Reporting for Contact Center, and whether information from the data stream is collected.

Note: Contact Center Reporting properties Address appears only if you have Reporting for Contact Center enabled.

Note: When using the CCRSAppSvrCfg application, you must right-click and use **Run as Administrator** for Windows Vista.

Supervisor Help Request Timeout

The Supervisor Help Request Timeout is when to escalate a request if a chosen supervisor does not answer the help request. You can choose a value from 1 to 60 seconds. The default is 12 seconds.

For more information about Supervisor Help, see "Supervisor Help" on page 181.

Selection Method (Supervisor Help From)

The Supervisor Help From setting lets you determine where supervisors for escalated requests are chosen from. For more information about Supervisor Help, see "Supervisor Help" on page 181.

All skillsets	sends an unanswered help request system-wide to all Contact Center supervisors.
Agent's skillsets only	sends an unanswered help request to only the supervisors assigned to skillsets that the agent is logged on to.

Enable Caller ID

The **Enable Caller ID** options let you select how you want caller ID information to be displayed on agent telephones:

- **Name with number backup**: displays the caller's name for 3 seconds and then the skillset name. If the caller's name is not available, the caller's number is shown.
- **Number only**: displays the caller's number for 3 seconds and then the skillset name.
- **None**: displays the skillset name.

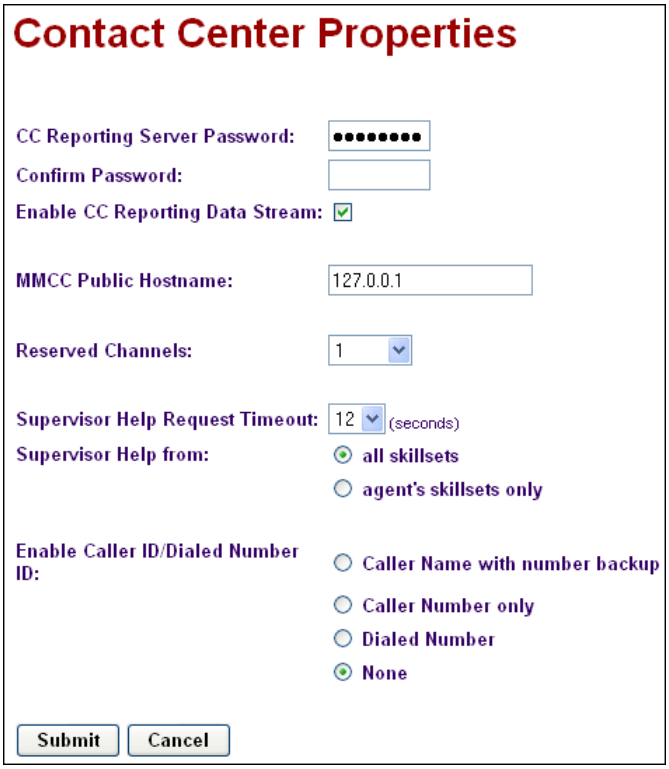
Setting up general Contact Center properties

For information about the general Contact Center properties, see "General Contact Center properties" on page 167.

To set up the general Contact Center properties

1. Start CallPilot Manager.
2. Click the **Contact Center** heading.

3 Click the **General Properties** link.
The Contact Center Properties page appears.



4 If you use Contact Center Reporting, in the **CC Reporting Server Password** box type the password that Contact Center Reporting users must enter to collect data. Type the password again in the **Confirm Password** box.

5 If you use Contact Center Reporting, select the **Enable CC Reporting Data Stream** check box to enable reporting data to be collected.

6 In the **MMCC Public Hostname** box, enter the appropriate public host name for your system. The MMCC Public Hostname can be an FQDN or the IP address of the Business Communications Manager.

7 From the **Reserved Channels** list box select the number of voice channels you want to reserve for Contact Center.

8 From the **Supervisor Help Request Timeout** list select a value between 1 and 60 seconds. The default is 12 seconds.

9 From the **Supervisor Help from** options select **all skillsets** or **agent's skillsets only**.

10 From the **Enable Caller ID** options select how you want caller information to be displayed on agent telephones:

- **Name with number backup**: displays the caller's name for 3 seconds and then the skillset name. If the caller's name is not available, the caller's number is shown.
- **Number only**: displays the caller's number for 3 seconds and then the skillset name.
- **None**: displays the skillset name.

11 Click **Submit**.

System Configuration Report

The System Configuration Report includes information about Contact Center configuration.

The Contact Center information in the System Configuration Report:

Contact Center Parameters	Lists the current Contact Center general parameters.
Contact Center agents	Lists for each agent: • Agent ID • Agent Name • Skillsets assigned • Supervisor status • Automatic answer • Missed call • Activity Code Entry Type
Contact Center skillsets	Lists for each skillset: • Skillset ID • Skillset Name • Control DN • Message Waiting Indicator extension • Method of Call Distribution • Break time • Delay answer time • Language type • Attd Ext • EWT# Calls • EWT Init Call Dur • EWT Increase Allowed • ActEntry Type
Contact Center Routing Tables	Lists for each skillset: • Skillset number • Day Routing Table start time • Night Routing Table start time • Day Routing Table steps • Night Routing Table steps
Contact Center overflow	• Skillset number • Skillset name • Rule • Service Mode • Conditions • Actions

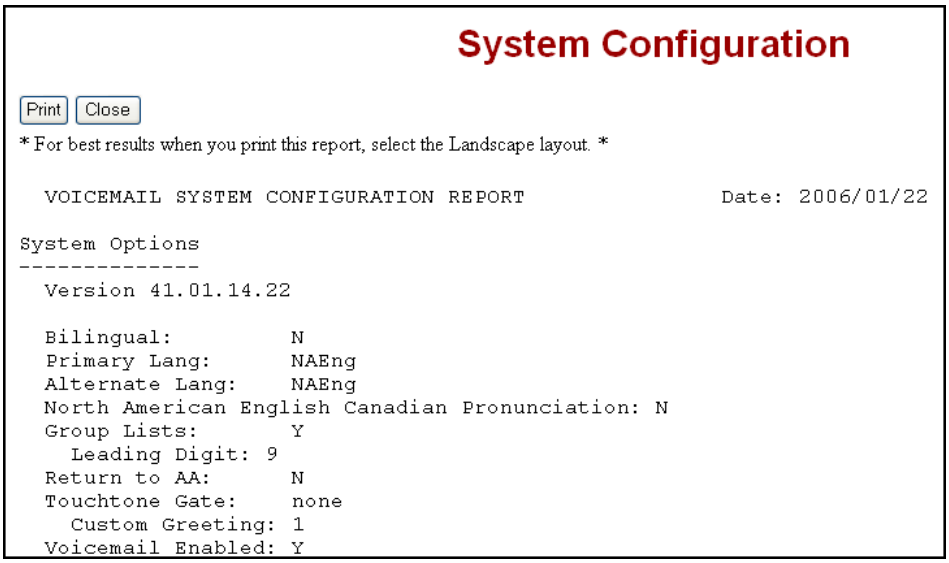
Contact Center Greetings	Lists for each Contact Center greeting: • Greeting number • Status (whether the greeting is recorded) • Caption • Skillsets that use the greeting
Contact Center Intelligent CLID/DNIS Routing	• Line • CLID/ANI number • DNIS number • Action
Contact Center Intelligent Caller Input Routing Tables	• Length of rule • Match string • Action
Expected Wait Time	EWT Greetings: • EWT Greeting Table Number • Wait Time Interval • Greeting ID
Activity Codes	• ID • Name • Description
Line Answering	• Line • Rings • Table • Skillset
Multimedia Contact Center Customized Files	• Interface Name • Files

To generate the System Configuration Report

1 Start CallPilot Manger.

2 Click the **Reports** heading.

3 Click the **System Configuration** link.
The System Configuration Report appears. It can take several minutes to generate the report.



System Configuration

Print Close

* For best results when you print this report, select the Landscape layout. *

```
  VOICEMAIL SYSTEM CONFIGURATION REPORT                Date: 2006/01/22

System Options
--------------
  Version 41.01.14.22

  Bilingual:          N
  Primary Lang:       NAEng
  Alternate Lang:     NAEng
  North American English Canadian Pronunciation: N
  Group Lists:        Y
    Leading Digit: 9
  Return to AA:       N
  Touchtone Gate:     none
    Custom Greeting: 1
  Voicemail Enabled: Y
```

4 To print the report, click **Print**.

5 When you are finished printing or viewing the report, click **Close**.

Chapter 14
Monitoring Contact Center call activity

Monitoring call activity

You can monitor call activity in two ways at your contact center:

- "Monitoring agent calls with Silent Monitor"
- "Monitoring skillsets" on page 178

You can monitor calls by using memory buttons that you program with the Feature Codes for monitoring:

- Display calls waiting in skillsets [✆] [9] [0] [9]
- Monitor agent calls [✆] [9] [0] [5].
  NOTE: To use [✆] [9] [0] [5], you must program it to a memory button and press the [✆] [9] [0] [5] memory button to monitor agent calls.

To program a memory button, see "Programming a memory button with a Feature Code" on page 36.

Monitoring agent calls with Silent Monitor

When you monitor calls as a Silent Monitor, you are not detected by the agent or callers. You monitor all of the calls on an agent's telephone, rather than on a call-by-call basis. When the current call is completed, the monitoring session of the agent continues. You do not have to reestablish the monitoring session. You must be logged on before you can monitor calls.

Note: While you monitor an agent's calls you monitor all of their calls, including their personal calls. Tell agents that if they make a call that they do not want monitored, they must first log off as an agent, then log on again when they complete the call.

You must program a memory button with [✆] [9] [0] [5], and then press the [✆] [9] [0] [5] memory button to monitor calls. If the memory button you choose has an indicator, the indicator shows your log on status. Call Center calls are not sent to you while you use [✆] [9] [0] [5].

Setting up Silent Monitor on your system

For monitoring to be silent, you must set up Silent Monitor on your system. If you are not familiar with this procedure, ask your system administrator to set up Silent Monitor.

To set up Silent Monitor on Business Communications Manager

Note: If you are using a Business Communications Manager system, see the *Nortel Business Communications Manager 5.0 Configuration—Telephony* for information about setting up Silent Monitor.

For monitoring to be silent, you must set up Silent Monitor in Element Manager. To do this, you must be familiar with using the Business Communication Manager Element Manager. If you do not have access to the Element Manager, ask your system administrator to set up Silent Monitor.

1. In Element Manager, on the Task Navigation panel, click the **Configuration** tab.
   The configuration folders display.
2. Click the **Telephony** folder, and then click the **Global Settings** folder.
3. Click the **Advanced Features** task.
4. Click the **Silent Monitor** heading.
5. From the **Monitoring Mode** list box, select **Silent**.
6. In the **Number of SM sets** box, enter the number of sets you want as supervisory telephones.
7. In the **SM Password box**, enter a six-digit password.
8. Log off Element Manager.

Note: If the Silent Monitor setting is set to non-silent, you hear a conference tone at the start of calls that you monitor, therefore, monitoring isn't silent.

Note: In the UK, the default for Silent Monitor is non-silent. In North America, the default is silent.

Using Silent Monitor with Answer DN

If you have an Answer DN programmed for your main telephone, and you are using Silent Monitor from your main telephone, the telephone that you have programmed as your Answer DN telephone rings briefly when:

- you monitor an agent who is not on a call, and the agent answers or places a call
- you start to monitor an agent who is on an active call
- you monitor an agent who puts a call on hold and answers another call or unholds the original call.

Monitoring tips

- More than one supervisor can log on to the same skillset.
- An agent can be monitored by only one supervisor at a time.
- While you are on a call, do not initiate a monitoring session.
- You must use a two line display telephone.
- Use a headset rather than handsfree when you monitor calls. This ensures call privacy and reduces the office noise level. Check the documentation for your telephone to make sure that you can use a headset with it.

Note: You cannot monitor an agent who is:

- on a conference call
- using an Answer DN
- on an ISDN or Digital Mobility set
- on any type of call if the maximum number of conference bridges (6) are being used

Logging on and monitoring agent calls

You must be logged on to monitor and answer calls. You cannot log on if the maximum number of agents is logged on, if you are logged on to another telephone, or if someone else is logged on to your telephone. You can log on only to skillsets that you are assigned to.

To log on and monitor agent calls

1 Press [⊙] [9] [0] [4].

2 Enter your Agent ID number and press OK or [#].

3 Enter your password and press OK or [#].
The default password you enter to log on for the first time, or if your password is reset, is 0000. If you enter the default password, you must change your password. Enter a new password from four to eight digits long and press OK. Enter your new password again and press OK.

4 Press IN to log on to one or more skillsets that you want to monitor. You can monitor only the agents who are logged on to the same skillset as you. If IN does not appear, you are already logged on to all the skillsets or there are no skillsets available.

5 Press CHNG until the skillset you want to log on to appears on the display. The skillsets that are available are the skillsets that are assigned to you. If there is only one skillset available to log on to that you are assigned to, you are automatically logged on to that skillset.

6 Press OK. The display briefly confirms the skillsets that you are logged on to.

7 Press [☎].
You are now logged on and can accept calls like a Contact Center agent.

8 To begin monitoring agent calls press the memory button programmed with [✆] [9] [0] [5].
After you press [✆] [9] [0] [5] Contact Center does not route calls to you.

9 Press OK to accept the skillset shown or press NEXT or PREV to find the skillset you want to monitor.

10 Enter the Agent ID of the agent you want to monitor and press OK.
Invalid Agent appears if the agent is not assigned to you.
You can press DIR to find the Agent ID in the Agent directory. You can monitor any agent logged into a skillset assigned to you.

11 Press INFO to display the Agent ID number, agent name, call state and the time in minutes and seconds that the call has been in this state. Call states include Idle, Not Ready, and Break (Incall, Outcall, Browse, AnsDN, Ringin).

12 Press INFO a second time to display the Agent ID number, agent name, and monitoring options again.

13 Press OBSV to monitor an agent. If another supervisor is monitoring the agent the OBSV button does not appear. At any time you can press the CANCL button to exit the monitoring session without logging off. If the agent has no active call, has a call on hold, or is on a conference call, you hear silence. You do not begin to monitor the agent until the agent takes a call, takes the call off hold, or ends the conference call.

14 If you want to join the call, press JOIN.
You can press MUTE to mute your voice while you monitor.
To end the monitoring session, press CANCL.
If you want to monitor another agent in the skillset, press NEXT until you see the agent you want to monitor, and then press OBSV.

You can program a memory button with [✆] [9] [0] [4]. If the memory button you choose has an indicator, the indicator shows your log on status.

- If the indicator is off, you are logged off.
- If the indicator is on, you are logged on.

An agent requests help while you are in a monitoring session

While you monitor an agent, the agent can request Supervisor Help. If an agent requests help, you are automatically selected to help and assumed to have accepted the request. When you are done, the Supervisor Help session ends and your original monitoring session resumes where it left off.

About monitoring sessions

Receiving a call on your telephone	If you are monitoring an agent and you get a call on your telephone, the monitoring session ends if you answer the call. When you end your call, you can press OBSV to reenter the monitoring session with the agent.
Making a call while monitoring	If you make a call while you are monitoring an agent, the monitoring session ends and you must begin monitoring using [6] [9] [0] [5] to reestablish a monitoring session.
Ending a session by logging off	The session ends if you or the agent are forced to log off or if the agent logs off voluntarily. If the agent is on a call at the time of log off, but you are still logged on and monitoring, the session continues until the call is disconnected or you press CANCL.
Conference calls	If the agent puts the a call that you are monitoring into a conference call, you do not hear the call for the duration of the conference call. When the agent goes out of conference, you are automatically monitoring the agent again. **NOTE:** If you want to monitor agents all the time, ask agents not to participate in conference calls.
On hold calls	If the agent puts a call that you are monitoring on hold, you do not hear the call while it is on hold. When the agent resumes the call, you are automatically monitoring the agent again. If an agent puts one call on hold and answers another call, you can monitor only the currently active call. When the agent switches back to the first call, this becomes the active call that you are monitoring.
Using VoIP telephones	Silent monitoring is not recommended if **both** of the parties being monitored are on an IP device, that is if your Contact Center uses both IP trunks and agent IP sets, or if the caller is using an IP set. If the agent is on an IP set and the caller is on an IP trunk, there is a noticeable interruption in audio for approximately 1 second when supervisor monitoring starts. This is noticeable to the agent and the caller. On systems that do not have IP trunks **and** IP agents this does not occur.
Digital Mobility sets	You cannot monitor agents who are logged on to Digital mobility sets.
ISDN sets	You cannot monitor agents who are logged on to ISDN (Integrated Services Digital Network) sets.
Maximum number of conference bridges	If the maximum number of simultaneous conference bridges (6) are being used, when you try to start a monitoring session your display shows “No conf avail”.
Transferred calls	If you are monitoring an agent and they transfer a call, you no longer hear the call.

Monitoring skillsets

Use [e] [9] [0] [9] (Display Waiting Calls) to view information about skillsets and the calls waiting in skillsets. The table below describes the information in each display.

Display	Description
Skill 1: Enabled	the skillset number and the status of the skillset. The status can be Enabled, Disabled or Uninit (uninitialized).
1: 6 agents	the skillset number and how many agents are currently logged on to the skillset
1: 10 calls	the skillset number and the number of calls waiting in the skillset
1: wait 9:45	the skillset number and the longest time a call has been waiting in the skillset.

Display Waiting Calls lets you know when a skillset in your contact center gets very busy. You can then ask qualified agents to log on to the busy skillset.

To monitor skillsets

1 Press [e] [9] [0] [9].
The skillset display for skillset 1 appears.

On a one line display telephone press	On a two line display telephone press	To
[1]	[1] or GOTO	enter the number of the skillset you want to monitor
[2]	[2] or SKILL	monitor the next enabled skillset
[3] or [6]	[3] or [6] or NEXT	go to the next skillset
[4]	[4] or PREV	go to the previous menu
[#]	[#]	go to the next menu
[*]	[*]	cancel the session
[☎]	[☎]	exit

Note: If at any time during a monitoring session you press a programmed memory key your monitoring session ends. Do not press a memory key unless you want to end your monitoring session.

An example of monitoring skillsets

In the example shown here, there are calls waiting in skillset 1. In this situation, after you monitor the skillsets, you can ask the qualified and available agents from another skillset to log on to skillset 1 until the calls in skillset 1 are handled.

1 Press [ ] [9] [0] [9].

```
Skill 1: Enabled
SKILL          NEXT
```

2 Press NEXT to monitor skillset 1.
In this example, skillset 1 is enabled and appears on the display first. If skillset 1 is not enabled, press NEXT to go to skillset 2. To monitor the next skillset, press SKILL at any time.

```
1: 7 agents
SKILL          NEXT
```

3 The display shows the number of agents logged on to skillset 1. Press NEXT.

```
1: 2 calls
SKILL          NEXT
```

4 The display shows the calls that are currently waiting to be answered by agents in skillset 1.
Press NEXT.

```
1: wait 4:00
SKILL          NEXT
```

5 The display shows that the call waiting the longest in skillset 1 has been waiting for four minutes.

6 Press [ ] to end the session
or
press NEXT to monitor skillset 2.

Using a memory button to monitor calls waiting in skillsets

Program a memory button with [ ] [9] [0] [9] to view the status of all skillsets, including the skillsets to which are logged on. If the memory button you choose has an indicator, the indicator shows information for the calls for the skillset to which you are logged on. For information about programming an memory button, see "Programming a memory button with a Feature Code" on page 36.

- If the indicator is off, all of the calls are within the acceptable wait time.
- If the indicator is flashing slowly, at least one call has exceeded the primary alert time.
- If the indicator is flashing quickly, at least one call in the skillset has exceeded the secondary alert time.

For information on setting wait times, see "Setting up general Contact Center properties" on page 168.

For information on Primary and Secondary alert times, see "Skillset properties" on page 54.

Taking some Not Ready time

If you use [✆] [9] [0] [8] (Not Ready), you do not receive Contact Center calls. You can program a Break Time, which makes Contact Center automatically wait a short time before it routes the next call to you. You use Break Time to complete any tasks, such as paperwork, required by the last call. If you need some extra time, use Not Ready to prevent Contact Center from routing another call to you. Do not use the Do Not Disturb feature. You can use Not Ready while a call is ringing on your telephone. The call that is ringing on your telephone goes back to the skillset. You can program a memory button with an indicator instead of pressing [✆] [9] [0] [8].

For information about programming a memory button, see "Programming a memory button with a Feature Code" on page 36. For more information about Break Time refer, to "Break Time" on page 54.

Note: While you use Not Ready, you still receive non-Contact Center, intercom, and transferred calls.

To use Not Ready

1. Press [✆] [9] [0] [8]. `Make Not Ready` appears on the display.
   If you press [✆] [9] [0] [8] and `Break canceled` appears on the display, you canceled the Break Time that the Contact Center Administrator programmed for you. You must press [✆] [9] [0] [8] again to activate the Not Ready feature.
   If you press [✆] [9] [0] [8] and `Agent active` appears, the Not Ready feature was on and you canceled it. Press [✆] [9] [0] [8] again to activate Not Ready.
2. When you are ready to take calls again, cancel the Not Ready feature by pressing [✆] [9] [0] [8].
   If `Not ready` appears, press [✆] [9] [0] [8] again.
   Not Ready is automatically enabled if you do not answer your telephone, and if this option is configured in Contact Center.

Programming Not Ready to a memory button

You can have convenient, one button access to Not Ready if you program a memory button with the Not Ready Feature Code. If the memory button you choose has an indicator, the indicator shows your busy status:

- If the indicator is off, Not Ready is off.
- If the indicator is on, Not Ready is on.
- If the indicator is flashing, the Break Time feature is on.

For information about programming a memory button, see "Programming a memory button with a Feature Code" on page 36.

Logging off

Log off when you complete your shift or will be away from your telephone for an extended period.

1 From the display that shows your name on the top line, press OUT. The date and time display appears.
If OUT does not appear, you are not logged on to any skillsets.

Changing your supervisor password

Keep your password confidential. Change your password regularly, about every 30 days.

To change your supervisor password

1 Press [e] [9] [0] [4].

2 Enter your Agent ID number and press OK.

3 Enter your password and press OK.
The default password you enter to log on for the first time, or if your password is reset, is 0000. If you use the default password you must change your password.

4 Press ADMIN.

5 Enter a new password from four to eight digits long and press OK.

6 Enter your new password again and press OK.

7 Press [☎].

Supervisor Help

With Supervisor Help an agent on a call can request help from a supervisor by pressing a programmed feature button. The agent can send an urgent request for help without interrupting the call, and without the caller being aware of the agent's help request.

Supervisor Help is for situations where an agent is on a call and urgently requires the help of a supervisor without alerting the caller that a supervisor is being called in. It is not intended for routine consultations or when the agent is not on a Contact Center call.

A supervisor who receives a help request can accept, deny, or ignore it. A request that is denied or ignored is escalated, and a larger group of supervisors is notified of the request. A supervisor can choose to escalate a request so that it is broadcast to other supervisors who may be better able to handle the request. If a supervisor receives a request while they are not at their set, their [e] [9] [0] [6] indicator flashes slowly to inform them of the missed request.

If a help request is escalated to a supervisor, their [ ] 9 0 6 indicator flashes quickly to inform them of the request. If the call for an escalated help request is still active, the supervisor can accept the request by pressing the [ ] 9 0 6 feature key. They do not have to be monitoring agents at the time, but can be answering Contact Center calls.

Note: Supervisors who use Make Busy [ ] 9 0 8 are still available for help requests.

When a supervisor accepts an agent's request for help, a Silent Monitor session starts and the supervisor begins monitoring the agent's call. The agent who requested help is informed when the monitoring session begins. If the supervisor is already monitoring the call of the agent who requests help, the supervisor is considered to have accepted the request for help.

How Supervisor Help works

To use Supervisor Help, supervisors must program a memory button with the Supervisor Help feature code [ ] 9 0 6. The programmed key must have an LCD indicator. The memory button can be a distinct bright color to distinguish it easily from other buttons. For information about programming a memory button, see "Programming a memory button with a Feature Code" on page 36.

When a supervisor is selected to answer an agent's help request, the supervisor's telephone rings once with a distinctive tone, and the Supervisor Help LCD indicator lights up and a message appears on the supervisor's display to accept or deny the call.

As soon as the supervisor accepts the request, Contact Center starts a Silent Monitor session between the supervisor and the agent.

If the supervisor denies or ignores a help request, the request is escalated. The [ ] 9 0 6 indicator flashes quickly on the sets of all supervisors who are notified of the escalated request. Active escalated requests take precedence over missed requests, so the Supervisor Help LCD indicator does not flash slowly if there are active requests that have not been accepted.

An escalated request goes to supervisors as follows:

No supervisors are available	the request escalates to all potential supervisors. If escalation is system wide, a potential supervisor is any logged on supervisor. If escalation is skillset based, a potential supervisor is one who is logged onto the requesting agent's skillsets.
The request is denied by the selected supervisor	the request escalates to all potential supervisors except for the selected supervisor, unless the selected supervisor is the only potential supervisor.
The request is ignored	the request escalates to all potential supervisors.

Agents can request Supervisor Help only if they are on an active Contact Center call. They cannot use Supervisor Help if they are not logged in, not ready, idle, have a call on hold, or are on a non-Contact Center call. An agent can cancel Supervisor Help at any time before a supervisor answers the request.

When an agent requests Supervisor Help, Contact Center looks for a single suitable supervisor to handle the request. If no supervisor is available, or the selected supervisor denies or ignores the request, the request is escalated. You set up supervisor selection to be either system wide or skillset based. System wide selection looks for all the available supervisors. Skillset based selection looks for only the supervisors who are assigned to the skillsets the agent is logged on to.

Configuring Supervisor Help

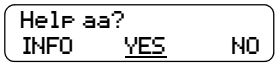
To set up Supervisor Help you must configure the general Contact Center properties for request timeout and supervisor selection method.

For information about	Refer to
Programming Supervisor Help	"Setting up general Contact Center properties" on page 168
Supervisor Help settings	"Supervisor Help Request Timeout" on page 168 "Selection Method (Supervisor Help From)" on page 168

How to handle Supervisor help requests

Supervisors can program the Supervise feature (F906) onto a memory button of their telephone.

1 Launch Supervisor Help by pressing [ ] [9] [0] [6] or the F906 memory button on your telephone.



2 The display shows the ID of the agent who is requesting help.
Press YES to accept the agent request for help
or
press NO to escalate the request
or
press INFO to view the agent name, time and date of the request, caller ID and caller name of the agent's call.

```
Help aa:
INFO          JOIN
```

3 The display shows the agent name.
While you monitor the agent, you can press the INFO key to view the time and date of the request, caller ID and caller name of the agent's call.
You can press the JOIN softkey or the MUTE button on your telephone to join in the call.
NOTE: Depending on what system you use, the Join and Mute softkeys may not appear.

4 When the help session is complete, press [☎] to end the session.

How to handle missed requests

When a supervisor's Supervisor Help LCD indicator is flashing, the supervisor can retrieve escalated or missed Supervisor Help requests.

If there are one or more requests, Contact Center shows all of the requests. Escalated requests for calls that are still active are shown first, from the oldest to most recent. After that, missed requests are shown from the oldest to the most recent.

A supervisor can accept the call by pressing the YES softkey. After the supervisor accepts the request, the request no longer appears to other supervisors who are retrieving help requests. Their displays show the next escalated request, or the first missed request if there are no more escalated requests, or "No help requests" if there are no more missed requests.

For a missed request, the prompt "aa:aname asked" appears, and the supervisor can retrieve information about the call by pressing the INFO softkey, or can move to the next request by pressing the NEXT softkey.

An example of retrieving an escalated request

The supervisor launches the Supervisor Help feature by pressing the Supervisor Help (F906) feature key.

1 Launch the Supervisor Help feature by pressing [✆] [9] [0] [6] or the F906 memory button on your telephone.

```
Help aa?
INFO    YES     NO
```

2 The display shows the ID and name of the agent requesting help.
Press YES to accept the help request
or
press INFO to see more information about the request
or
press NO to deny the request. This escalates the request, and the display shows the next help request, if there is one.

3 When the help session is complete, press [☎] to end the session.

For a missed request, the prompt “aa asked help” appears”.

After a missed request is viewed by a supervisor, it is not shown to any other supervisor.

Chapter 15
Activity Codes

Agents use Activity Codes to allocate the time they spend on calls to one or more activities. Contact Center stores the amount of time allocated to an Activity Code and the number of times an Activity Code is entered. You can generate reports that show the length of time the caller and agent discussed the topic designated to the corresponding Activity Code.

To use Activity Codes, you must have Reporting for Contact Center installed.

What Activity Codes are

An Activity Code has a digit numeric value between 1 to 16 digits, a name of up to 16 characters that is displayed on agent telephones, and a detailed description of up to 50 characters. You enter a list of Activity Codes in the Activity Code table using CallPilot Manager.

Activity Codes can be used for Contact Center calls only. If an agent receives a non-Contact Center call or initiates an outgoing call, Activity Codes do not apply.

Optional and Prompted Activity Code logging

Agents use the Activity Code Feature Code, [✆] [9] [0] [7], to designate an activity for a call. Agents can use [✆] [9] [0] [7] on one and two-line sets. You can configure the agent's settings so that a [✆] [9] [0] [7] session automatically appears on the agent's telephone at the end of the call (Prompted). If the setting is Optional, the [✆] [9] [0] [7] session does not appear.

Optional is the default setting.

Contact Center expects the agent to enter Activity Codes for the call at some point during the "active peg period". The active peg period is a period of time that begins when the call is connected to the agent and ends when:

- The agent's Break Time ends, either by timing out or the agent cancelling it with F908
- The agent logs out of all skillsets with F904
- The agent takes another call
- The agent makes a held call active. If the agent has multiple calls, at the end of the active call they can enter Activity Codes for the call at any time up until they take a held call off hold.

Note: Any time that a call spends on hold is included in the Activity Code time.

If the agent's Break Time is zero, the active peg period ends when the call disconnects.

Agents have the option of pressing [e] [9] [0] [7] to enter an Activity Code from the time the call starts until the end of the active peg period. Agents can enter [e] [9] [0] [7] any number of times during the active peg period to record activities for the same call. Agents can enter a maximum of 5 Activity Codes per [e] [9] [0] [7] session. The talk time is associated with all the activities entered. Agents have one final [e] [9] [0] [7] session after the call ends.

Each time an agent enters an Activity Code, Contact Center increases by one the number for that activity. For example, if the agent presses [e] [9] [0] [7] three times during a call and enters Activity Code 1 the first time, Activity Code 2 the second time, and Activity 1 the third time, the the count for Activity Code 1 is 2.

Prompted

A [e] [9] [0] [7] session appears on a Prompted agent's telephone when a call ends. The session is active until:

- the agent enters an Activity Code

  or, if the agent does not enter an Activity Code, until:

- the agent releases the session by pressing the Release or the Feature button
- the active peg period ends

If Contact Center detects that a call ended and the agent did not enter Activity Codes, Contact Center starts a Prompted Activity Code session on the agent's telephone. If the agent does not enter an Activity Code at this point, for example if the agent releases the session, Contact Center records the No Peg Activity Code. This is a System Activity Code that is explained in "System Activity Codes" on page 191.

Note: If an agent logs out of all skillsets, Contact Center does not start a Prompted Activity Code session. If the active peg period ends with the agent logging out, Contact Center does not start a [e] [9] [0] [7] session. Contact Center records the No Peg Activity Code instead.

Optional

The only difference between Optional and Prompted is that if Activity Codes are Optional, a [e] [9] [0] [7] session does not automatically start on an agent's telephone when they end a call.

Examples of Activity Code calls

During an active call, each time an agent enters an Activity Code, the time up to that point is recorded with the Activity Code entered. The start time is either when the agent answers the call or, if the agent has already entered an Activity Code, when the agent enters the last Activity Code. The time period for the final Activity Code entry (after the call ends) covers the time up to when the call ends.

Example 1: The agent enters Activity Codes during the call

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent enters Activity Code 1	5 minutes
9:08	Agent enters Activity Code 2	3 minutes
9:10	End of call	
9:12	Agent enters Activity Code 3	2 minutes

If the agent enters multiple Activity Codes during one [*] [9] [0] [7] session, Contact Center allocates the talk time to all the Activity Codes that the agent enters. For example, if an agent presses [*] [9] [0] [7] once, after the call ends, the total time of the call is allocated to all the Activity Codes the agent enters. The count is increased for each Activity Code the agent enters.

Example 2: The agent enters Activity Codes after the call

Time	Activity	Peg time
9:00	Start of call	
9:10	End of call	
9:11	Agent enters Activity Codes 1,2,3	10 minutes

Activity Codes Contact Center automatically enters: Autopegs and System Activity Codes

Contact Center has two types of Activity Codes it can automatically enter:

- Autopegs. See "Autopegs" on page 190.
- System Activity Codes. See "System Activity Codes" on page 191.

Autopegs

Whether an agent is Prompted or Optional, if the agent enters an Activity Code while a call is connected and does not enter another Activity Code by the end of the active peg period, there is a period of talk time that is does not have an Activity Code assigned to it. If this happens, Contact Center assigns the last Activity Code the agent entered to the remaining time. This is called an Autopeg. An Autopeg does not affect the peg count.

Examples of Autopeg calls

Autopeg example 1

An agent enters Activity Code 1 during the call. Contact Center assigns the same Activity Code, Activity Code 1, for the remaining talk time:

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent enters Activity Code 1	5 minutes
9:12	End of call	
	End of active peg period. Contact Center autopegs Activity Code 1	7 minutes

Autopeg example 2

The agent enters two Activity Codes and does not enter another Activity Code during the active peg period, so Contact Center counts Activity Code 2 for an additional 5 minutes. The count for each Activity Code remains at 1.

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent enters Activity Code 1	5 minutes
9:07	Agent enters Activity Code 2	2 minutes
9:12	End of call	
	End of active peg period. Contact Center autopegs Activity Code 2.	5 minutes

Autopeg example 3

During the call, the agent enters three Activity Codes. The agent does not enter another Activity Code during the active peg period. Contact Center counts Activity Code 1, 2, and 3 for an additional 12 minutes. The count is 1 for each Activity Code.

Time	Activity	Peg time
9:00	Start of call	
9:06	Agent enters Activity Codes 1,2,3	6 minutes

9:18	End of call.	
	End of active peg period. Contact Center autopegs Activity Codes 1,2,3.	12 minutes

System Activity Codes

System Activity Codes track statistics that cannot be tracked directly by agents. Agents cannot enter System Activity Codes. They are automatically recorded by Contact Center when it detects certain activities.

System Activity Codes appear in the Activity Codes table, but you cannot modify or delete them. Importing Activity Codes does not affect your System Activity Codes. They are not part of the maximum 2,000 entries in the table.

System Activity Codes use reserved values in the range 9999999999999901 to 9999999999999999, and appear in Activity Code reports.

System Activity Codes that Contact Center records

No Peg when No Activity Code is entered	If the agent does not enter an Activity Code by the end of the active peg period, Contact Center records the No Peg System Activity Code. If an agent enters an Activity Code as their Break Time is ending, it is possible that Contact Center will not record the Activity Code, and will record the No Peg System Activity Code instead. The No Peg System Activity Code is 9999999999999999.
Held Call Abandoned for calls on hold that are abandoned	If an agent puts a call on hold and the held caller hangs up, Contact Center records the Held Call Abandoned Activity Code using the time the caller was on hold. The Held Call Abandoned Activity Code is 9999999999999998.

Examples of System Activity Code calls

Example 1: No Peg

A call where the agent does not enter an Activity Code.

Time	Activity	Peg time
9:00	Start of call	
9:10	End of call	
	If Activity Codes are Prompted and the agent does not enter an Activity Code, Contact Center starts a F907 session. If the Break Time is 0, Contact Center does not start a F907 session. Whether Activity Codes are Prompted or Optional, if the agent does not enter an Activity Code, Contact Center records the No Peg System Activity Code for 10 minutes.	

Example 2: Held Call Abandoned and No Peg

A Prompted call where an on-hold caller hangs up.

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent puts call 1 on hold	
9:05	Start of call 2	
9:07	Call 1 on hold hangs up. Contact Center records the Held Call Abandoned System Activity Code for 2 minutes and the No Peg System Activity Code for 5 minutes.	2 minutes 5 minutes

Prompted and Optional Activity Code logging

You apply the Prompted or Optional setting to skillsets and agents using CallPilot Manager. If you set a skillset to Prompted, all of the calls to the skillset must have Activity Codes entered for them. If you set an agent to Prompted, the agent must enter an Activity Code for every call they answer. If either the skillset or the agent setting is Prompted, entering Activity Codes for calls is prompted. If both skillset and agent are optional, entering Activity Codes is optional.

The call's skillset is its current skillset. The call's current skillset is not necessarily the original skillset because a call can move to a new skillset through a transfer or intelligent routing rule.

The default setting for skillsets and agents is Optional.

Examples of Prompted and Optional Calls

Example 1: Optional where the agent does not enter an Activity Code

Time	Activity	Peg time
9:00	Start of call	
9:11	End of call	
	Since entering Activity Code is Optional, there is no Prompted F907 session. Because the agent did not enter an Activity Code, Contact Center records the No Peg System Activity Code for 10 minutes.	10 minutes

Example 2: Prompted where the agent does not enter an Activity Code

Time	Activity	Peg time
9:00	Start of call	
9:10	End of call	
	A prompted F907 session appears on the agent telephone at the end of the call. Because the agent does not enter an Activity Code, Contact Center records the No Peg System Activity Code for 10 minutes.	10 minutes

Example 3: Prompted or Optional where the agent enters an Activity Code during a call

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent enters Activity Code 1	5 minutes
9:11	End of call.	
	End of the active peg period. Contact Center autopegs Activity Code 1 for 6 minutes.	6 minutes

Example 4: Prompted or Optional where the agent enters several Activity Codes during a call

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent enters Activity Code 1	5 minutes
9:08	Agent enters Activity Code 2	3 minutes

9:11	End of call.	
	End of active peg period. Contact Center applies the last Activity Code entered, and autopegs Activity Code 2 for the remainder of the call.	3 minutes

Example 5: The first agent is Prompted and the second agent is Optional

Time	Activity	Peg time
9:00	Start of call	
9:03	Agent 1 enters Activity Code 1	3 minutes
9:05	Agent 1 transfers the call to Agent 2. Agent 1 has until the end of the Active Peg period to enter another Activity Code. Because agent 1 did not, Contact Center Autopegs the remaining 2 minutes of talk time.	
9:10	End of call.	
	End of the active peg period. Because agent 2 did not enter an Activity Code, Contact Center records the No Peg System Activity Code for 5 minutes.	5 minutes

How Activity Codes interact with system features

Transfer to Agent

If a call is transferred to another agent, the second agent can continue to enter Activity Codes for the call. Here are three examples, all with Prompted Activity Codes.

Example 1: Both agents enter Activity Codes

Time	Activity	Peg time
9:00	Start of call 1	
9:05	Agent 1 enters Activity Code 1	5 minutes
9:07	Agent 1 transfers call to agent 2. If Agent 1 does not enter another activity code, Contact Center autopegs 2 minutes for Activity Code 1.	
9:10	Agent 2 enters Activity Code 2	3 minutes
9:15	End of call. If Agent 2 does not enter an Activity Code by the end of the Active Peg period, Contact Center Autopegs an additional 5 minutes for Activity Code 2.	

Example 2: The first agent enters an Activity Code

Time	Activity	Peg time
9:00	Start of call 1	
9:05	Agent 1 enters Activity Code 1	5 minutes
9:07	Agent 1 transfers the call to agent 2. If the agent does not enter another Activity Code, Contact Center Autopegs 2 minutes for Activity Code 1.	
	Agent 2 does not enter an Activity Code.	
9:15	End of call. A F907 session appears on Agent 2's telephone.	
	End of active peg period. Because agent 2 has not entered an Activity Code, Contact Center records the No Peg System Activity Code for 8 minutes.	8 minutes

Example 3: The second agent enters an Activity Code

Time	Activity.	Peg time
9:00	Start of call 1	
9:07	Agent 1 transfers the call to agent 2. As soon as Agent 1 transfers the call, a prompted F907 session starts on their telephone. If agent 1 does not enter an Activity Code before the end of the Active Peg period, Contact Center records the No Peg System Activity Code for 7 minutes.	
9:10	Agent 2 enters Activity Code 2	3 minutes
9:15	End of call. If agent 2 does not enter another Activity Code by the end of the Active Peg period, Contact Center Autopegs 5 minutes for Activity Code 2.	

Break Time

Break Time is a skillset property that gives agents an interval to complete tasks related to the previous call. When Break Time starts, if a call is Prompted and the agent did enter an Activity Code during the call, an [e] [9] [0] [7] session starts on the agent's telephone. The session remains for two minutes unless the agent ends the session by entering an Activity Code, releasing the session, or taking another call.

A [e] [9] [0] [7] session ends after two minutes of inactivity. If an agent enters Activity Codes during the [e] [9] [0] [7] session, the timer resets, so the [e] [9] [0] [7] session can be longer than two minutes.

If [e] [9] [0] [7] is active on the agent's set when break time expires, the break time continues while the [e] [9] [0] [7] session is active. When the [e] [9] [0] [7] ends the break time also ends.

While a [e] [9] [0] [7] is active, no Contact Center calls will come to the agent. The break time is extended until the [e] [9] [0] [7] session exits.

It is the agent's responsibility to either enter an Activity Code or release the session. Otherwise [✆] [9] [0] [7] remains on the agent's display for a maximum of 2 minutes. If the [✆] [9] [0] [7] session ends because it times out, the break time also ends.

At the end of Break Time:

- if a call is Optional and the agent did not enter an Activity Code, Contact Center system records the No Peg System Activity Code.
- If a call is Prompted and the agent did not enter an Activity Code, the [✆] [9] [0] [7] session exits and Contact Center records the No Peg System Activity Code.

If an agent enters an Activity Code, whether Prompted or Optional, that does not cover the entire talk time of the call, Contact Center autopegs the last Activity Code the agent entered for the remainder of the talk time.

If an agent enters an Activity Code as their Break Time is ending, it is possible that Contact Center will not record the Activity Code, and will record the No Peg System Activity Code instead.

Note: If the Break Time is 0, a F907 session never automatically starts on an agent's telephone, even if the agent is Prompted for Activity Codes. Make sure the Break Time is longer than 10 seconds to allow time for Activity Code entry.

For more information about Break Time properties for a skillset, see "Break Time" on page 54.

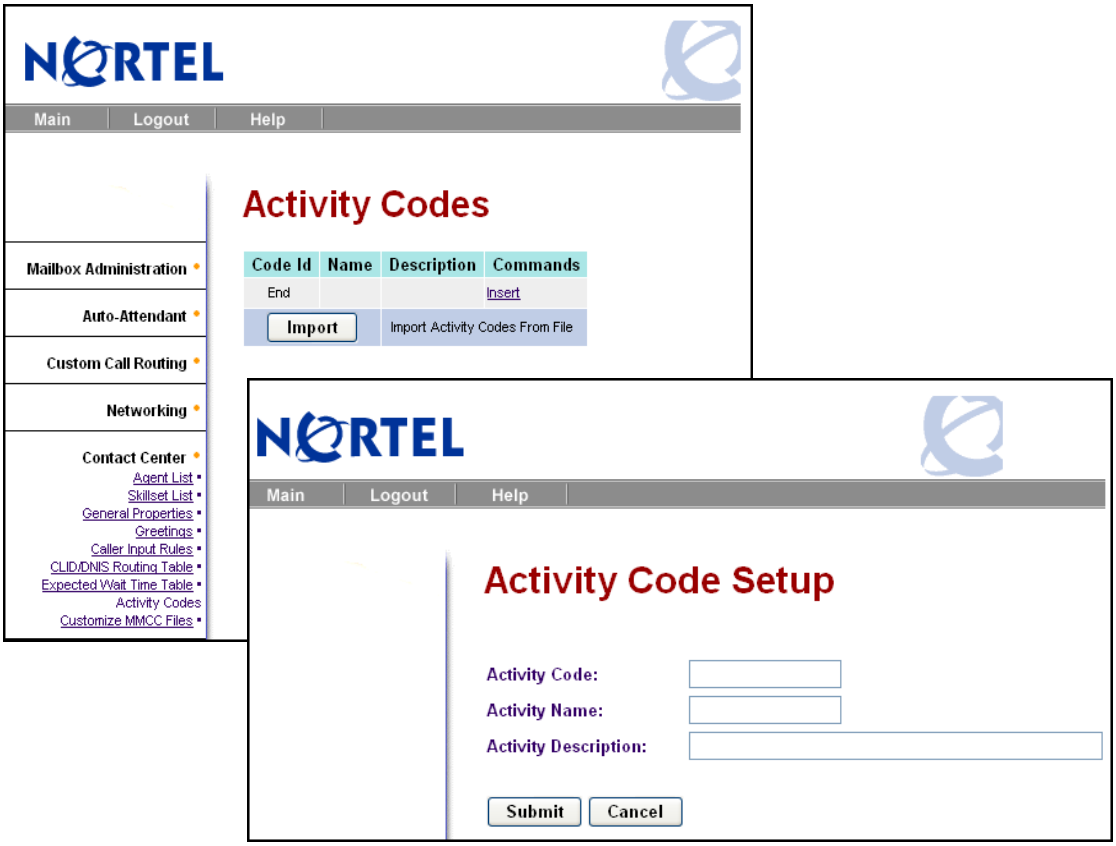
Creating, changing, and deleting Activity Codes

You create Activity Codes using CallPilot Manager. The Activity Codes table can have a maximum of 2,000 entries.

To create an Activity Code

1 Click the **Contact Center** heading and click the **Activity Codes** link.
The Activity Codes page appears.

2 Click the **Insert** link.
The Activity Code Setup page appears.



3 In the **Activity Code** box type the number of the activity code, for example, 1.
The number can be a maximum of 16 digits long.

4 In the **Activity Name** box type the name for the activity code, for example, Cgy Sales 1.
The name can be a maximum of 16 alphanumeric characters long.

5 In the **Activity Description** box type a description for the Activity Code, for example, Calgary sales dept 1st tier. The description can be a maximum of 50 alphanumeric characters long.

6 Click **Submit**.
The new Activity Code appears in the Activity Codes table.

To change an Activity Code

You can change an Activity Code's name and description. You cannot change an Activity Code's number.

1. Click the **Contact Center** heading and click the **Activity Codes** link.
   The Activity Codes page appears.
2. Click the **Change** link for the Activity Code you want to change.
   The Activity Code Setup page appears.
3. Make the changes you want to the Activity Code's name and description.
4. Click **Submit**.

To delete an Activity Code

1. Click the **Contact Center** heading and click the **Activity Codes** link.
   The Activity Codes page appears.
2. Click the **Delete** link for the Activity Code you want to delete.
   The Activity Code is deleted from the Activity Codes table.

Importing Activity Codes

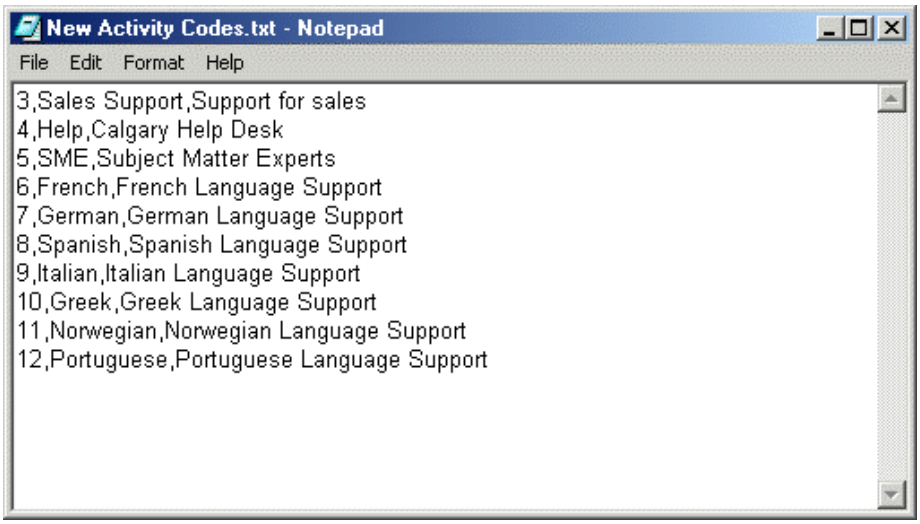
You can import files of Activity Codes. You can update the Activity Code table with a spreadsheet or other file. You specify whether the file replaces the Activity Code list, or is added to it.

Creating a list of Activity Codes

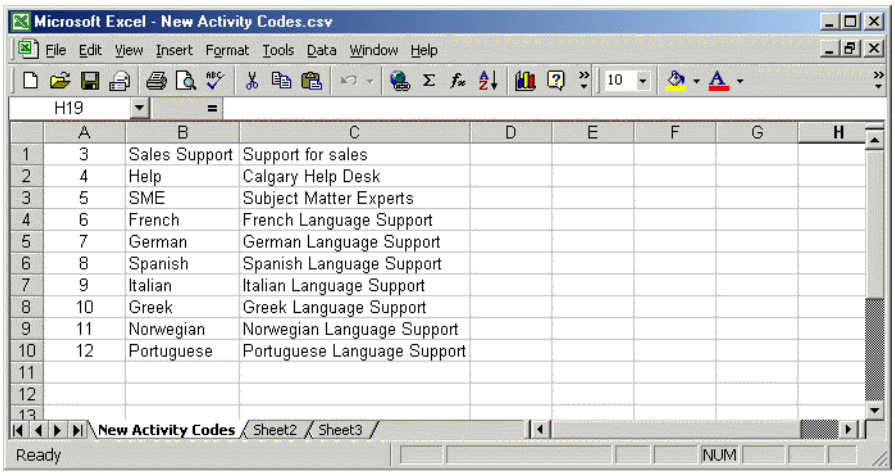
The file you create to import must:

- be in ASCII format. If you create the list in Notepad, save it in ANSI format. If you create the list in Excel, save it in .csv format.
- have one Activity Code per line, comprised of the ID, name, and description, separated by commas.

Example of an Activity Code list created in Notepad



Example of an Activity Code List created in Excel

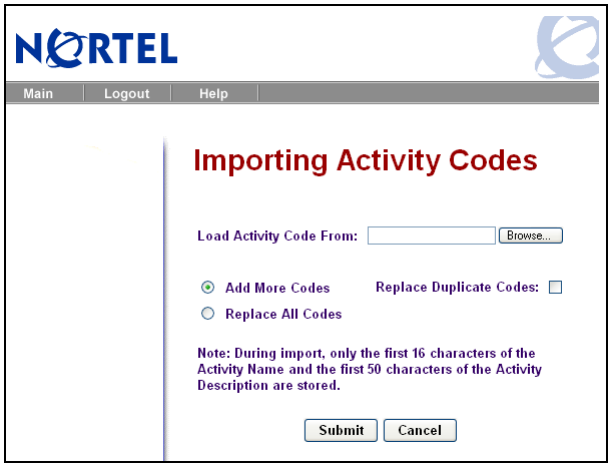


	A	B	C
1	3	Sales Support	Support for sales
2	4	Help	Calgary Help Desk
3	5	SME	Subject Matter Experts
4	6	French	French Language Support
5	7	German	German Language Support
6	8	Spanish	Spanish Language Support
7	9	Italian	Italian Language Support
8	10	Greek	Greek Language Support
9	11	Norwegian	Norwegian Language Support
10	12	Portuguese	Portuguese Language Support

To import a list of Activity Codes

1. Click the **Contact Center** heading and click the **Activity Codes** link. The Activity Codes page appears.
2. Click **Import**.

The Importing Activity Codes dialog box appears.



3 In the **Load Activity Code From** box, enter the path of the file you want to import
or
click **Browse** and locate the file.

4 Choose the **Append** option if you want to add the list of Activity Codes to your existing Activity Codes, and select the **Replace Duplicate Codes** check box if you want to replace any duplicates in the Activity Code table with the new values in your list,
or
choose the **Replace All Codes** option if you want to replace your table of Activity Codes with the new list.

5 Click **Submit**.
If you chose to replace all codes, a message appears that asks you to confirm that you want to replace all the Activity Codes in the table. Click **Yes**.

Communicating Activity Codes to supervisors and agents

You can print the Activity Code table screen and distribute it to supervisors and agents in your Contact Center. Then they will know which Activity Codes your Contact Center uses, and how to enter them.

When you make any changes to your Activity Codes, be sure to communicate the changes to the agents and supervisors.

Assigning Activity Code settings to agents and skillsets

By default agents and skillsets have Optional prompting for Activity Codes.

To set up or change Activity Code settings for an agent

Refer to:

- "Adding an agent or a supervisor" on page 44
- "Adding more than one agent" on page 46
- "Changing agent information" on page 48

To set up or change Activity Codes for a skillset

Refer to "Setting up or changing a skillset" on page 56.

Generating Activity Code reports

You can generate Activity Code reports that are sorted according to Activity Code, skillset and agent. For information on generating these reports see the *Reporting for Contact Center Setup and Operations Guide* (NN40040-602).

You can view a list of your Activity Codes by ID, name and description in the System Configuration report. For more information see "To generate the System Configuration Report" on page 172.

How agents enter Activity Codes

[✆] [9] [0] [7] is the Feature Code for Activity Codes. We recommend that agents program [✆] [9] [0] [7] to a memory button on their telephone. For how to program a Feature Code to a memory button see "Programming a memory button with a Feature Code" on page 36.

1 During or after a call but before the end of the active peg period, the agent presses [✆] [9] [0] [7].

If an agent is Prompted and has not entered an Activity Code by the end of the call, an [✆] [9] [0] [7] session starts automatically.

```
Activity Id:
RETRY          OK
```

2 The agent enters the Activity Code number and presses OK.

```
Sales support
RETRY          OK
```

3 The Activity Code name is displayed, in this example *Sales support*. The agent presses OK to confirm this is the correct Activity Code.

```
Another actv?
YES     NO
```

4 The agent can press YES to enter another Activity Code or press NO to end the [*] [9] [0] [7] session.

Pressing NO or releasing the session on this display submits Activity Codes.

Chapter 16
Tips for operating Contact Center

This chapter provides tips to improve the operation of Contact Center.

Agent administration

- Agents can log on to any telephone on the system.
- Contact Center has an Auto Busy Mode feature that ensures that calls do not ring indefinitely at an abandoned agent set. If an agent does not answer a call within a specified number of rings, the call returns to the skillset to be presented to another agent, and the telephone is placed into Auto Busy Mode by Contact Center. The agent must manually cancel Auto Busy Mode to resume accepting calls.

Skillset administration

- If a call comes in on a line that belongs to a skillset with no available agents, the call is not answered until either the Delay Answer Time elapses or an agent becomes available for the call.

  During the Delay Answer period when the caller hears ringback, the line the call comes in on still rings on the sets configured to answer this line.

Contact Center greetings

- Record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, waiting callers must wait longer before they hear a greeting because voice ports are used each time a greeting is played to a caller. The longest recorded greeting for a skillset affects the frequency with which callers hear greetings. If your greeting length times vary a lot, there is a very large variance in how often callers hear greetings. Therefore it is best to keep greetings similar lengths if possible.
- Ensure that when you record greetings that you use to transfer callers to a skillset mailbox you include in the greeting: "*To leave a message in the mailbox press nine*" (or the keypad button you designate for the skillset mailbox).

Routing Table administration

- Use Forced Play greetings sparingly. If you use Forced greetings, keep them as short as possible. Many long Forced Play greetings slows transferring calls to agents and causes unpredictable increases in distribution times. Calls in other skillsets are not affected.
- When a Forced Play greeting plays for the highest priority call in a skillset, the other lower priority calls in the skillset have to wait even if agents become available during this time. For example, the longest waiting call, which is the highest priority call, gets routed to a Forced Play greeting. Agents become available during the time that the highest priority call is played a Forced Play greeting. The result is that no calls in this skillset are routed to an agent until the Forced Play greeting is finished playing to the highest priority call. This guarantees that the highest priority call is answered before lower priority calls in the skillset.
- Ensure that an Intelligent Caller Input Routing, Basic transfers calls to a skillset mailbox if you want callers to be able to press 9 to leave a message in a skillset mailbox. Remember to explain in your greeting that the you can press 9 to leave a message in a mailbox.
- Program Intelligent Caller Input Routing, Basic to transfer calls to a skillset mailbox for Non-business hours greetings so that you do not miss any messages.
- If a Goto step follows a greeting, make a Distribution step the target for the Goto step. If you make the Goto target step after a Greeting step another Greeting step, callers hear two greetings in a row.

Routing calls using Dynamic Call Priority

If you use priority to route calls to agents, make sure you have both Agent Priority and Call Priority configured. Each call that enters a skillset is given a default call priority of 10. You can change a call's priority using:

- Intelligent Caller Input Routing, Advanced Option
- Intelligent CLID/DNIS Routing
- Intelligent Overflow Routing

Call priority is distinct from agent priority. If a waiting call needs to be routed, for example when an agent becomes available, Contact Center determines which waiting call must be handled next. This is the call with the highest priority, or, if all the waiting calls have the same priority, the call with the longest wait time. Contact Center then determines the right agent to handle the call. If the skillset's method of call distribution is Preferred, Contact Center finds the available agents assigned to and logged in to the skillset, and chooses the one with the highest priority. If the method is Least Busy, the agent that has been available longest is routed the call.

Contact Center general parameters

- Do not assign all the available voice channels as reserved channels. Contact Center can use any voice channel, but reserved channels are never used by voicemail.
- A reserved or voice channel is used when:
  - a Contact Center greeting is played to a caller
  - Off-premise Message Notification notifies you of a message in a skillset mailbox

How to calculate the longest time a caller can be on hold

The formula used to calculate the longest wait time a caller can be on hold without hearing a greeting is:

$$\text{Wait Time} = \left[\left(\frac{\text{maximum calls}}{\text{voice channels}}\right) - 1\right] \text{ x maximum greeting length}$$

where:

- **wait time** is the longest time in seconds that a caller can be on hold without hearing a greeting
- **maximum calls** is the maximum number of calls that Contact Center can normally handle
  - In a contact center where external calls are **not** transferred or forwarded to Contact Center, the maximum number of calls is the same as the number of lines programmed to be answered by Contact Center
  - In a contact center where external calls **are** frequently transferred or forwarded to Contact Center, the maximum number of calls is the total number of lines on the system.
    For information about how calls transfer to a skillset, see "How incoming calls are sent to a skillset" on page 53.
- **voice channels** is the estimated number of voice channels available to Contact Center
  - The minimum number of voice channels available is equal to the number of reserved channels you set up in General Contact Center parameters. Additional channels that are not used by CallPilot can also be used. For example, even though you assign two reserved channels when you set up the General Contact Center parameters, Contact Center can use additional voice channels if and when they are available.
- **maximum greeting length** is the duration of the longest greeting of a skillset in seconds

Tips to improve the efficiency of Contact Center

Plan for busy times:

- when you assign agents to the skillsets, assign as many qualified agents as possible to answer calls for the skillsets
- have agents log on to a skillset when it gets busy
- have routing that moves the call to another skillset with a higher priority

Plan for slow times:

- for example, if agents are logged on to skillset 1 only, ensure that incoming calls to skillset 2 overflow to skillset 1. When you set up skillset parameters for skillset 2, assign a time to the Overflow parameter. Then callers can still speak to an agent.
- When no agents are logged on to any skillset, ensure that the Contact Center greetings set up in the Routing Table have Transfers set up. If a Contact Center greeting transfers to a skillset mailbox, callers can press 9 to leave a message in the skillset mailbox. Ensure that the greeting includes that callers can press 9 to leave a message in a mailbox. 9 is the default keypad button callers can press to transfer to the skillset mailbox. You can select a different number.

Assigning DNs

When you assign a CDN to a skillset

- To pick a Control DN, go into the Element Manager and click the Configuration tab. Then click Telephony> Sets> Inactive DNs page. Click Model and use a DN tagged as an "Application" model. Make sure the DN you are using is not already used as a skillset DN or as the MeetMe DN. Use Feature 985 (F985) to view both lists.
- If a telephone or any other device uses the same extension, the Contact Center does not answer calls.
- The system assigns a skillset mailbox that uses the CDN as its mailbox number. You must initialize the mailbox before you can use the skillset or the mailbox.
- Do not rename a telephone DN to a CDN used by Contact Center.

Note: After DN pool renumbering, the Skillset DN retains the same DN value, even though it is now outside the range of application DNs. You can renumber the Skillset DN to place it within the application DN range. For more information about renumbering DNs in BCM, see the *Nortel Business Communications Manager 5.0 Configuration—Devices.*

Chapter 17
Examples of Contact Center configurations

There are many ways to set up Contact Center in your company. Here are two examples of how one business configured Contact Center to meet its changing needs:

- "Contact Center with Reporting"
- "Multimedia Contact Center" on page 221

Contact Center with Reporting

A year after they installed Contact Center, Mosaic Hardwood Flooring moved to a larger location and expanded their team to 33 members. They now have one PRI trunk, which lets them handle more calls. Mosaic wants to upgrade their Contact Center to keep up with their increased call volume. They want to be able to direct calls to sales, customer service, preferred customers, and installation bookings. They want to track how many of each type of call is being received each week, and they want to tell callers on hold what the Expected Wait Time is.

Mosaic has seven on-site and two off-site sales representatives. There are two staff members who book installations and two staff members who track service requests. The installation team has expanded to 20 members.

Three senior sales people handle the preferred customers calls. Only the sales people take sales-related calls. Installation bookings calls are handled by the installation booking employees. Service requests are handled by two service request employees and any of the installation team when they are in the shop.

Here is how Mosaic configures their Contact Center:

"General Configuration" on page 209

"General Properties" on page 210

"Caller Input Rules" on page 210

"Expected Wait Time" on page 211

"Activity Codes" on page 211

"Lines" on page 211

"Skillset 1" on page 212

- "Routing Tables" on page 212
- "Service Mode" on page 213
- "Overflow" on page 214

"Skillset 2" on page 214

- "Routing Tables" on page 215
- "Service Mode" on page 216

- “Overflow” on page 216

“Skillset 3” on page 217

- “Routing Tables” on page 217
- “Service Mode” on page 218
- “Overflow” on page 218

“Skillset 4” on page 219

- “Routing Tables” on page 219
- “Service Mode” on page 220
- “Overflow” on page 220

General Configuration

Additional keycodes	Intelligent Contact Center Upgrade, Reporting for Contact Center
Agents	Agent 1- Bob Agent 2- John Agent 3- Jane Agent 4- Sales4 Agent 5- Installation booker 1 Agents 6-14 Installers Agents 15-19 Sales Agent 20- Installation booker 2 Agent 21-22 Supp_book1 Agents 23-33- Installers
Greetings	Welcome to Mosaic Hardwood Flooring Sales department. Please stay on the line for one of our representatives or enter your Customer ID.
Greeting 2	Welcome to Mosaic Hardwood Flooring Support department. Press 1 to book a support request, 2 to check on the status or cancel an existing booking, or stay on the line for general inquiries.
Greeting 3	Welcome to Mosaic Hardwood Flooring Installation department. Press 1 to book an Installation request, 2 to check on the status or cancel an installation booking, or stay on the line for general inquiries.
Greeting 4	Thank you for entering your Customer ID. A representative will be with you shortly.
Greeting 5	All of our representatives are currently busy. Please continue to hold or press 9 to leave a message.
Greeting 6	Thank you for continuing to hold. Please stay on the line, or press 9 to leave a message which will be returned as soon as possible by a representative.
Greeting 7	Thank you for continuing to hold. Please stay on the line or press 9 to leave a message.
Greetings 8 & 9	Advertisement Announcements1 & 2
Greetings 10 & 11	Support Announcements 1 & 2
Greetings 12 & 13	Installation Announcements 1 & 2
Greeting 50	The expected wait time for your call is 3 minutes. Please stay on the line or press 9 to leave a message.
Greeting 51	The expected wait time for your call is 6 minutes. Please stay on the line or press 9 to leave a message.
Greeting 52	The expected wait time for your call is 9 minutes. Please stay on the line or press 9 to leave a message.

Greeting 53	The expected wait time for your call is 12 minutes. Please stay on the line or press 9 to leave a message
Greeting 54	The expected wait time for your call is 15 minutes. Please stay on the line or press 9 to leave a message.
Greeting 55	All of our representatives are currently assisting other clients. Please remain on the line, or press 9 to leave a message.

General Properties

Primary alert	03:00
Secondary alert	10:00
CC Reporting Server Password	1234
Enable CC Reporting Data Stream	Enabled
Reserved channels	2
Supervisor Help request timeout	12
Supervisor Help from	All skillsets
Enable Caller ID	Name with number backup

Caller Input Rules

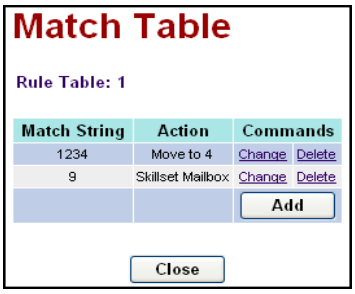


Table 1: Variable length

Match string 1234: move to skillset 4
Match string 9: send to skillset mailbox

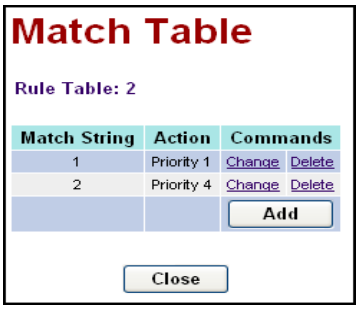


Table 2: Fixed length

Match string 1: change priority to 1
Match string 2: change priority to 4

Expected Wait Time

EWT Greeting Table

Expected Wait Time Table ID: 1

No	Wait Time Interval	Greeting ID	Commands	
1	Up To: 00:03:00	50	Change	Delete
2	Up To: 00:06:00	51	Change	Delete
3	Up To: 00:09:00	52	Change	Delete
4	Up To: 00:12:00	53	Change	Delete
5	Up To: 00:15:00	54	Change	Delete
			Add	
	After all times above	56	Change	

Close

Activity Codes

Activity Codes

Code Id	Name	Description	Commands	
40	Sales 1	sales question	Change	Delete
41	Sales 2	sales appointment booking	Change	Delete
50	Support 1	support question	Change	Delete
51	Support 2	support booking	Change	Delete
52	Support 3	support	Change	Delete
60	Install 1	installation question	Change	Delete
61	Install 2	installation	Change	Delete
70	Preferred 1	preferred misc	Change	Delete
71	Preferred 2	preferred sales	Change	Delete
72	Preferred 3	preferred support	Change	Delete
73	Preferred 4	preferred installation	Change	Delete
End			Insert	
Import		Import Activity Codes From File		

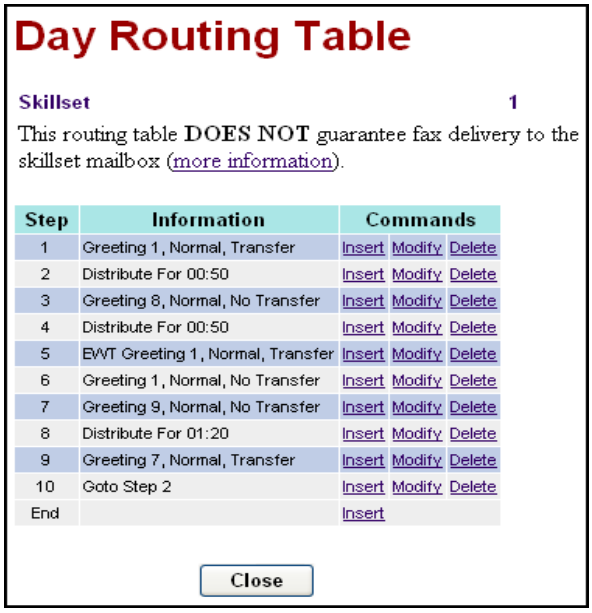
Lines

239	No	---	0	Change
240	No	---	0	Change
241	Contact Center	Skillset 1	0	Change
242	Contact Center	Skillset 2	0	Change
243	Contact Center	Skillset 3	0	Change
244	Contact Center	Skillset 4	0	Change
245	No	---	0	Change
246	No	---	0	Change

Skillset 1

Properties	
Name	Sales
MWI DN	333
Method	Least busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT increase allowed	Enabled
Initial call duration	00:03:00
Activity Code entry type	Prompted
Agents	1, 2, 3, 4, 15, 16, 17, 18, and 19

Routing Tables



Day Routing Table

Skillset 1

This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).

Step	Information	Commands		
1	Greeting 1, Normal, Transfer	Insert	Modify	Delete
2	Distribute For 00:50	Insert	Modify	Delete
3	Greeting 8, Normal, No Transfer	Insert	Modify	Delete
4	Distribute For 00:50	Insert	Modify	Delete
5	EWT Greeting 1, Normal, Transfer	Insert	Modify	Delete
6	Greeting 1, Normal, No Transfer	Insert	Modify	Delete
7	Greeting 9, Normal, No Transfer	Insert	Modify	Delete
8	Distribute For 01:20	Insert	Modify	Delete
9	Greeting 7, Normal, Transfer	Insert	Modify	Delete
10	Goto Step 2	Insert	Modify	Delete
End		Insert		

Close

Day Routing Table steps

1 - Greeting 1
Advanced Caller Input: Table 1

2 - Distribute 00:50

3 - Greeting 8

4 - Distribute 00:50

5 - EWT Table 1
Basic Caller Input:
9 = Transfer to skillset mailbox

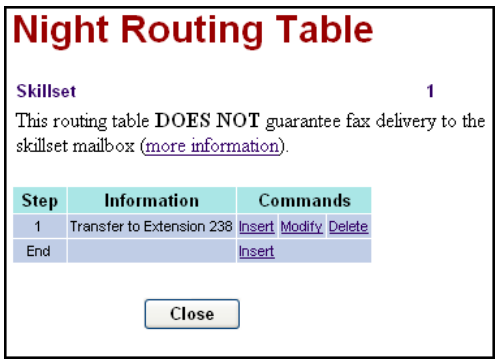
6 - Distribute 00:50

7 - Greeting 9

8 - Distribute 01:20

9 - Greeting 7
Basic Caller Input:
9 = Transfer to skillset mailbox

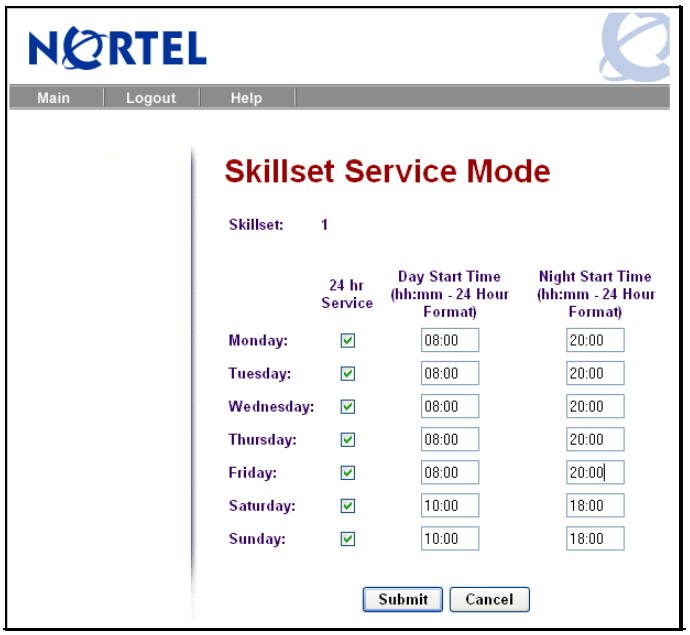
10 - Go to step 2



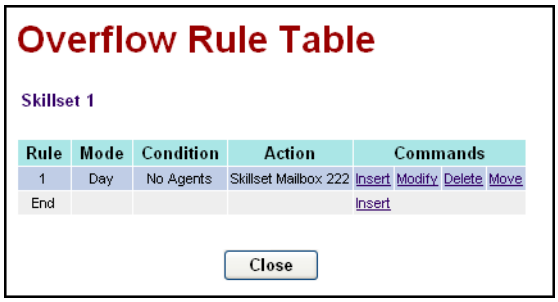
Night Routing Table steps

1 - Transfer to extension

Service Mode



Overflow



Overflow Rule Table

Skillset 1

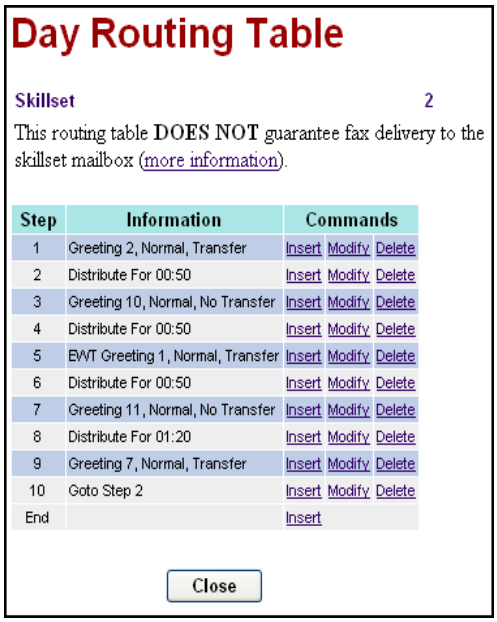
Rule	Mode	Condition	Action	Commands			
1	Day	No Agents	Skillset Mailbox 222	Insert	Modify	Delete	Move
End				Insert			

Close

Skillset 2

Properties	
Name	Support
MWI DN	334
Method	Least Busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT Increase Allowed	Enabled
Initial Call Duration	00:03:00
Activity Code Entry Type	Prompted
Agents	21, 22, 6, 7, 8, 9, 10, 11, 12, 13, 14, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33

Routing Tables



Day Routing Table

Skillset 2

This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).

Step	Information	Commands		
1	Greeting 2, Normal, Transfer	Insert	Modify	Delete
2	Distribute For 00:50	Insert	Modify	Delete
3	Greeting 10, Normal, No Transfer	Insert	Modify	Delete
4	Distribute For 00:50	Insert	Modify	Delete
5	EWT Greeting 1, Normal, Transfer	Insert	Modify	Delete
6	Distribute For 00:50	Insert	Modify	Delete
7	Greeting 11, Normal, No Transfer	Insert	Modify	Delete
8	Distribute For 01:20	Insert	Modify	Delete
9	Greeting 7, Normal, Transfer	Insert	Modify	Delete
10	Goto Step 2	Insert	Modify	Delete
End		Insert		

Close

Day Routing Table steps

1 - Greeting 2
Advanced Caller Input: Table 2

2 - Distribute 00:50

3 - Greeting 10

4 - Distribute 00:50

5 - EWT Table 1
Basic Caller Input:
9 = Transfer to skillset mailbox

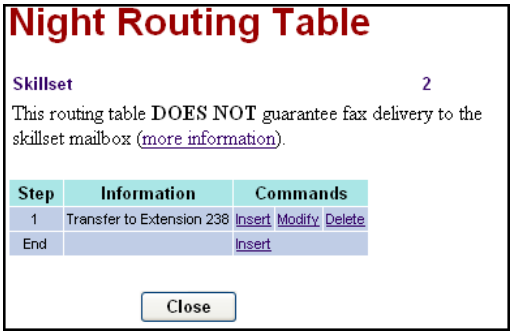
6 - Distribute 00:50

7 - Greeting 11

8 - Distribute 01:20

9 - Greeting 7
Basic Caller Input:
9 = Transfer to skillset mailbox

10 - Go to step 2



Night Routing Table

Skillset 2

This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).

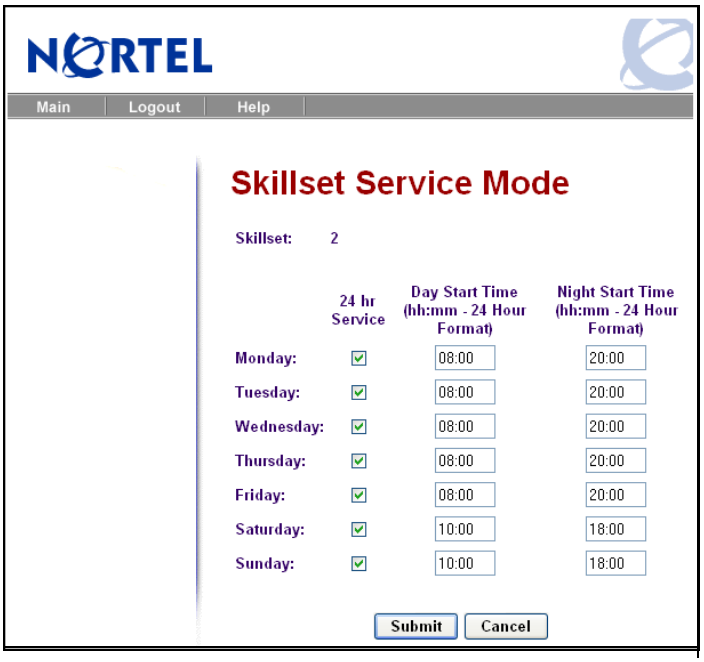
Step	Information	Commands		
1	Transfer to Extension 238	Insert	Modify	Delete
End		Insert		

Close

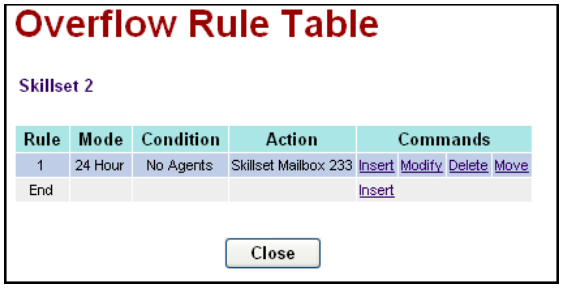
Night Routing Table steps

1 - Transfer to extension

Service Mode



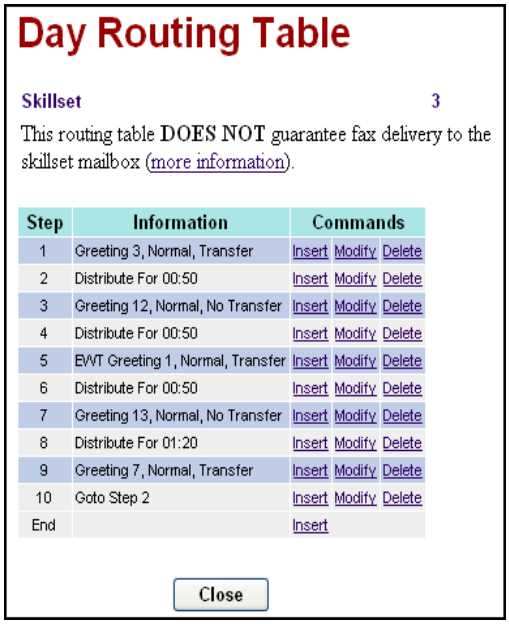
Overflow



Skillset 3

Properties	
Name	Installation
MWI DN	335
Method	Least Busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT Increase Allowed	Enabled
Initial Call Duration	00:30:00 (hs:mm:ss)
Activity Code Entry Type	Prompted
Agents	5, 20

Routing Tables



Day Routing Table

Skillset 3

This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).

Step	Information	Commands		
1	Greeting 3, Normal, Transfer	Insert	Modify	Delete
2	Distribute For 00:50	Insert	Modify	Delete
3	Greeting 12, Normal, No Transfer	Insert	Modify	Delete
4	Distribute For 00:50	Insert	Modify	Delete
5	EWT Greeting 1, Normal, Transfer	Insert	Modify	Delete
6	Distribute For 00:50	Insert	Modify	Delete
7	Greeting 13, Normal, No Transfer	Insert	Modify	Delete
8	Distribute For 01:20	Insert	Modify	Delete
9	Greeting 7, Normal, Transfer	Insert	Modify	Delete
10	Goto Step 2	Insert	Modify	Delete
End		Insert		

Close

Day Routing Table steps

1 - Greeting 3
Advanced Caller Input: Table 2

2 - Distribute 00:50

3 - Greeting 12

4 - Distribute 00:50

5 - EWT Table 1
Basic Caller Input:
9 = Transfer to skillset mailbox

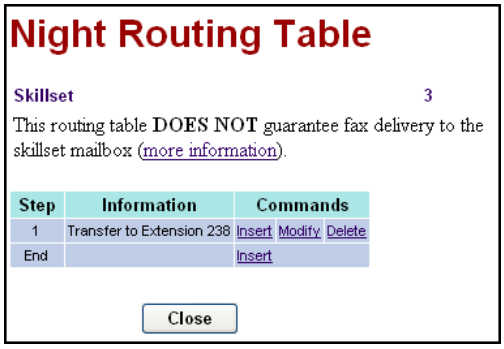
6 - Distribute 00:50

7 - Greeting 13

8 - Distribute 01:20

9 - Greeting 7
Basic Caller Input:
9 = Transfer to skillset mailbox

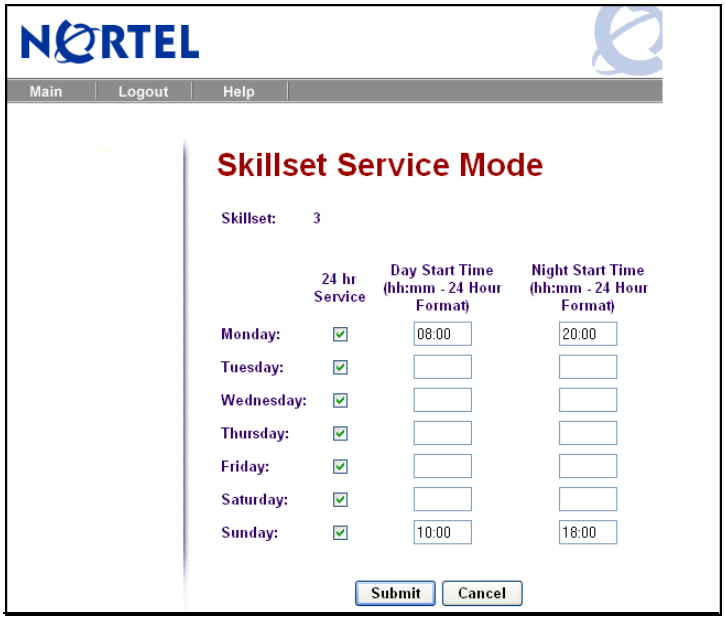
10 - Go to step 2



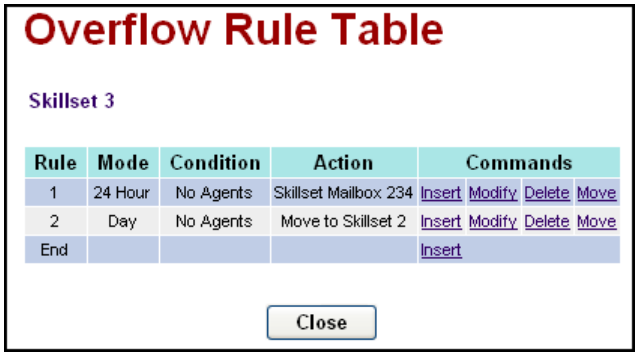
Night Routing Table steps

1 - Transfer to extension

Service Mode



Overflow



Skillset 4

Properties	
Name	Preferred
MWI DN	336
Method	Least Busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT Increase Allowed	Enabled
Initial Call Duration	00:30:00 (hs:mm:ss)
Activity Code Entry Type	Prompted
Agents	1, 2, 3

Routing Tables

Day Routing Table

Skillset 4

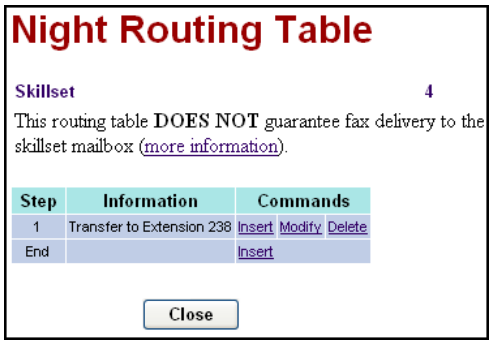
This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).

Step	Information	Commands
1	Greeting 4, Normal, No Transfer	Insert Modify Delete
2	Distribute For 00:30	Insert Modify Delete
3	Greeting 5, Normal, Transfer	Insert Modify Delete
4	Distribute For 00:30	Insert Modify Delete
5	EWT Greeting 1, Normal, Transfer	Insert Modify Delete
6	Distribute For 00:30	Insert Modify Delete
7	Greeting 6, Normal, No Transfer	Insert Modify Delete
8	Goto Step 2	Insert Modify Delete
End		Insert

Close

Day Routing Table steps

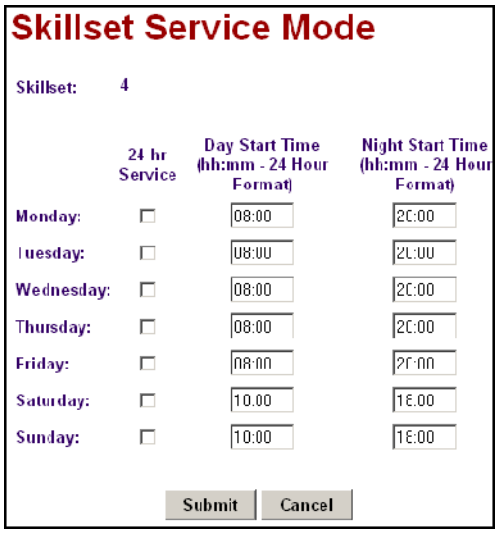
1 - Greeting 4
2 - Distribute 00:30
3 - Greeting 5
Basic Caller Input:
9 = Transfer to skillset mailbox
4 - Distribute 00:30
5 - EWT Table 1
Basic Caller Input:
9 = Transfer to skillset mailbox
6 - Distribute 00:30
7 - Greeting 6
8 - Go to step 2



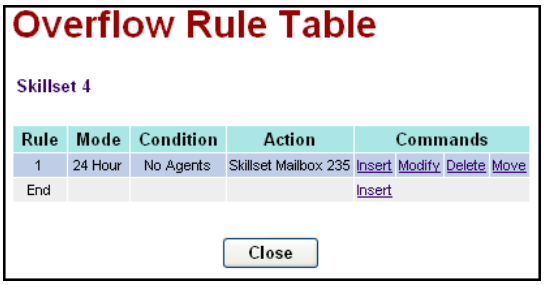
Night Routing Table steps

1 - Transfer to extension

Service Mode



Overflow



Multimedia Contact Center

Mosaic Hardwood Flooring wants to enhance their webpage to be voice-enabled. They send an e-mail to select customers with the latest information about new products and specials. The message has with an HTML link that links customers to Mosaic Hardwood Flooring staff.

Mosaic also puts voice-enabled HTML links on the web pages of their sponsors.

To meet the new load on the Contact Center, Mosaic hires three new staff members as Multimedia Contact Center agents. These agents take only Multimedia Contact Center calls.

Here is how Mosaic configures their Contact Center:

"General properties" on page 221

"Activity Codes" on page 222

"Lines" on page 223

"Skillset 5" on page 223

- "Routing Tables" on page 224
- "Service Mode" on page 225
- "Overflow" on page 225

General properties

The General Properties, Caller Input Rules and EWT Tables are unchanged.

Additional keycodes	Multimedia Contact Center
Agents	Agent 1- Bob Agent 2- John Agent 3- Jane Agent 4- Sales4 Agent 5- Installation booker 1 Agent 6- Installer1 Agent 7-14 Installers Agent 15- Sales5 Agent 16-19 Sales Agent 20- Installation booker 2 Agent 21- Supp_book1 Agent 22- Supp_book2 Agent 23-33 Installers Agent 34-36 MMCC Agents
Greetings	

Greeting 148	**Voice** Welcome to Mosaic Hardwood Flooring. Please stay on the line for one of our representatives. **Image** A picture of the company logo that Multimedia Contact Center displays in callers' web browsers.
Greeting 149	**Voice** A service advertisement **Image** A picture that corresponds to the advertisement that Multimedia Contact Center displays in callers' web browsers.
Greeting 150	**Voice** A product advertisement **Image** A picture that corresponds to the advertisement that Multimedia Contact Center displays in callers' web browsers.

Activity Codes

Activity Codes

Code Id	Name	Description	Commands	
40	Sales 1	sales question	Change	Delete
41	Sales 2	sales appointment booking	Change	Delete
50	Support 1	support question	Change	Delete
51	Support 2	support booking	Change	Delete
52	Support 3	support	Change	Delete
60	Install 1	installation question	Change	Delete
61	Install 2	installation	Change	Delete
70	Preferred 1	preferred misc	Change	Delete
71	Preferred 2	preferred sales	Change	Delete
72	Preferred 3	preferred support	Change	Delete
73	Preferred 4	preferred installation	Change	Delete
80	MMCC 1	Multimedia Contact Center sales	Change	Delete
81	MMCC 2	Multimedia Contact Center support	Change	Delete
82	MMCC 3	Multimedia Contact Center installation	Change	Delete
83	MMCC 4	Multimedia Contact Center misc	Change	Delete
85	MMCC 5	Multimedia Contact Center wrong number	Change	Delete
End			Insert	
Import		Import Activity Codes From File		

Lines

239	No	---	0	Change
240	No	---	0	Change
241	Contact Center	Skillset 1	0	Change
242	Contact Center	Skillset 2	0	Change
243	Contact Center	Skillset 3	0	Change
244	Contact Center	Skillset 4	0	Change
245	No	---	0	Change
246	No	---	0	Change

Outdial with pool PRI-A

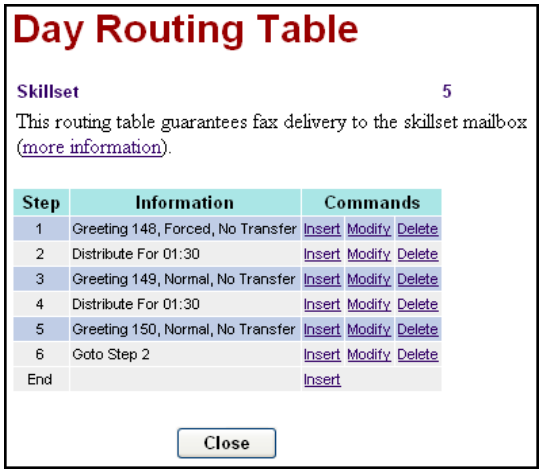
Skillset 5

Skillsets 1 - 4 are unchanged. See:

- "Skillset 1" on page 212
- "Skillset 2" on page 214
- "Skillset 3" on page 217
- "Skillset 4" on page 219

Properties	
Name	MMCC
MWI DN	337
Method	Least Busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT Increase Allowed	Enabled
Initial Call Duration	00:03:00
Activity Code Entry Type	Prompted
Agents	31, 35, 36

Routing Tables



Day Routing Table

Skillset 5

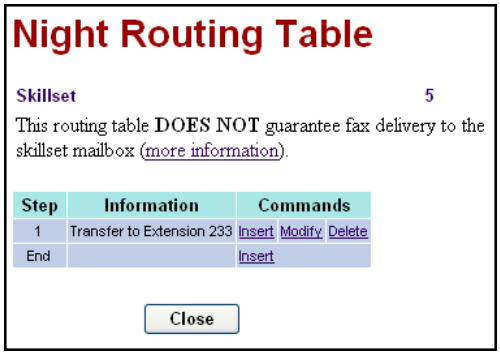
This routing table guarantees fax delivery to the skillset mailbox (more information).

Step	Information	Commands		
1	Greeting 148, Forced, No Transfer	Insert	Modify	Delete
2	Distribute For 01:30	Insert	Modify	Delete
3	Greeting 149, Normal, No Transfer	Insert	Modify	Delete
4	Distribute For 01:30	Insert	Modify	Delete
5	Greeting 150, Normal, No Transfer	Insert	Modify	Delete
6	Goto Step 2	Insert	Modify	Delete
End		Insert		

Close

Day Routing Table steps

1 - Greeting 148 Forced Greeting
2 - Distribute 01:30
3 - Greeting 149
4 - Distribute 01:30
5 - Greeting 150
6 - Go to step 2



Night Routing Table

Skillset 5

This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).

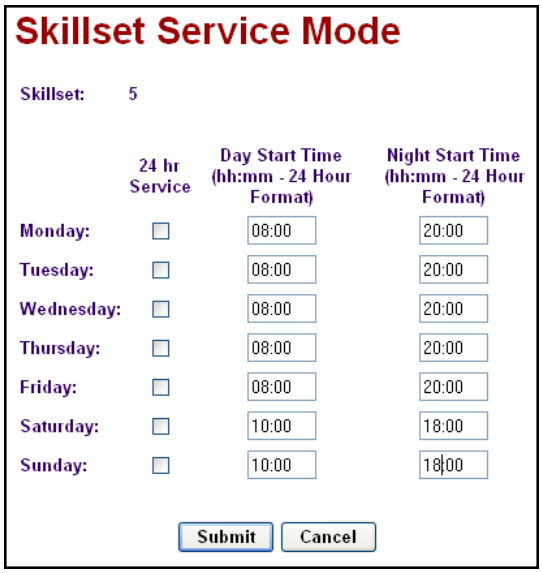
Step	Information	Commands		
1	Transfer to Extension 233	Insert	Modify	Delete
End		Insert		

Close

Night Routing Table steps

1 - Transfer to extension

Service Mode



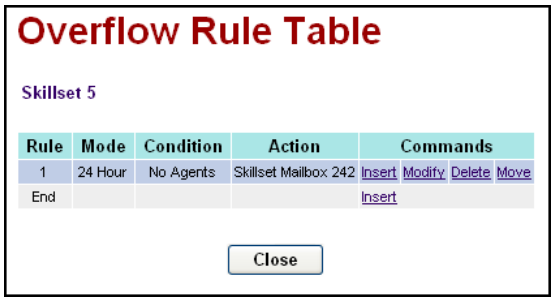
Skillset Service Mode

Skillset: 5

	24 hr Service	Day Start Time (hh:mm - 24 Hour Format)	Night Start Time (hh:mm - 24 Hour Format)
Monday:	☐	08:00	20:00
Tuesday:	☐	08:00	20:00
Wednesday:	☐	08:00	20:00
Thursday:	☐	08:00	20:00
Friday:	☐	08:00	20:00
Saturday:	☐	10:00	18:00
Sunday:	☐	10:00	18:00

Submit Cancel

Overflow



Overflow Rule Table

Skillset 5

Rule	Mode	Condition	Action	Commands			
1	24 Hour	No Agents	Skillset Mailbox 242	Insert	Modify	Delete	Move
End				Insert			

Close

Chapter 18
Troubleshooting Contact Center

This chapter contains troubleshooting information for problems that can occur while setting up and operating Contact Center.

Resetting passwords

You can reset passwords if they are lost or forgotten.

To reset	see
the Operator password	page 227
the Contact Center Administrator password	page 228
a skillset mailbox password	page 76
an agent password	page 50

Resetting the Operator password

You can reset the Operator (9 8 2) password if it is lost or forgotten.
9 8 2 is used by the receptionist, Operator and Contact Center Administrator.

If you reset the Operator password it is reset to 6 7 3 7 2 8 6 7 (Operator).

To reset the Operator password using CallPilot Manager

1. Start CallPilot Manager.
2. Click the **Operations** heading.
3. Click the **Operator Settings** link.
   The Operator Settings page appears.
4. Click the **Reset Operator Password** check box.
5. Click **Submit**.
   The password is reset to 6 7 3 7 2 8 6 7 (Operator).

To reset the Operator password using a phone

1 Press [⌂] [9] [8] [5].

```
VM: xxxx
                NEXT
```

2 Press NEXT.

```
MeetMe: xxxx
                NEXT
```

3 Press NEXT

```
CDN 1:xxxx
                NEXT
```

4 Press NEXT

```
CDN 2:xxxx
                NEXT
```

5 Press [7].

```
Pswd:
RETRY           OK
```

6 Enter [7] [3] [7] [3] [8] [6] [7] [3] [7] [7] [7] [9] [3] (Resetoperpswd) and press OK.

```
Reset pswd?
YES      NO
```

7 Press YES.

```
Exit
```

8 The session ends.
The Operator password is now reset to
[6] [7] [3] [7] [2] [8] [6] [7]
(Operator.)

Resetting the Contact Center Administrator password

You can reset the Contact Center Administrator password if it is lost or forgotten.

To reset the Contact Center Administrator password

For information about resetting the Contact Center Administrator password, see See "Contact Center access" on page 29.

Agent problems

Agent log on problems

If an agent cannot log on at their phone:

- ensure the agent ID and password match
- check to see if the agent is already logged on to a different phone
- check to see if a different agent is logged on to this phone

Important considerations about how agents use features

Call Transfer

Agents can use Transfer to transfer a call to another agent, another person such as a subject matter expert, or send the call back to a skillset.

- If the agent wants to send the call to a specific agent or another person, the agent can enter the Transfer Feature Code ([✆] [7] [0]) and enter the extension number.
- If the agent wants to send the call to a skillset, the agent can enter the Transfer Feature Code ([✆] [7] [0]) and enter the CDN of a skillset to send the call to a skillset.
- If you are monitoring an agent and they transfer a call, you do not continue to hear the call until the transferred call is answered.

Agents who want to transfer a call to a mailbox should use [✆] [9] [8] [6] .

Agents who take only Multimedia Contact Center do not receive Contact Center voice calls, but other Contact Center agents can transfer voice calls to Multimedia Contact Center agents.

Call Forward

Advise agents not to use Call Forward. An agent who uses Call Forward is automatically logged out or made auto busy, depending on their agent settings, after the number of rings for transfer callback elapses. Contact Center does not support Call Forward All Calls (CFAC) to an external number. If the agent configures CFAC to an external number, the calls are dropped. Agents can use Call Forward to the voicemail DN.

Activity Codes

Agents who answer a call on an Answer DN telephone or who use Call Pickup on a call that is ringing at another agent's set cannot enter activity codes.

Answer DN

If you are doing silent or muted monitoring, the only way agents should use Answer DN is if they program their portable set to be the Answer DN for their main telephone. You This is because you will not be able to monitor calls that agents answer on their Answer DN. You can only monitor calls that agents answer from the set they are logged on to. For more information about using Answer DNs with Contact Center for BCM, see the *Nortel Business Communications Manager 5.0 Configuration—Devices Guide*.

If an agent uses their Answer DN telephone to answer a call that is transferred to them, Contact Center does not recognize the agent as being busy, and still sends calls to the agent's main set. Agents who log on from a regular telephone and answer Contact Center calls using an answer DN key from a portable telephone cannot use Supervisor Help.

Do Not Disturb

Instead of using Do Not Disturb, agents must use the Not Ready Feature Code (9 0 8). If agents use Do Not Disturb they are automatically logged out or made not ready after the first call.

Call Forward No Answer

When an agent's phone is on Call Forward No Answer to the voicemail extension, the number of rings for Call Forward No Answer must be less than the number of rings for Transfer Callback Timeout. If a call is forwarded by CFNA to another agent and is answered by that agent, the original agent who has CFNA setting is made Not Ready or logged out instead of staying idle.

Preventing calls from ringing at an agent's set

To prevent agents who are on a Contact Center call from having a second internal call ring on their phone, set the Call Forward on Busy feature for your set to the voicemail DN.

For information about programming any of these settings for BCM450 and BCM50, *see the Nortel Business Communications Manager 5.0 Configuration—Devices* .

Hunt groups

Do not program an agent telephone to be a member of a Hunt Group.

Automatic Answer

How Automatic Answer works depends on what type of telephones your Contact Center uses:

- **WLAN Handset 2210/2211**: You can set up the WLAN Handset 2210/2211 for the Automatic Answer feature in two ways in a Contact Center environment:
  - Place the WLAN Handset in the active (idle) state. When the WLAN Handset receives a call, the handset automatically switches to the active (off-hook) state and the call proceeds as normal. **Note**: In the active (idle) state, WLAN Handset power consumption increases, which causes a decrease in the life of the battery (the time before a recharge is required). The handset is not normally left in the active (idle) state, except for special situations.
  - Place the WLAN Handset in the standby state. When the WLAN Handset receives a call, the handset automatically answers the call, but it cannot maintain the call. You must press the **Power on/Start Call** key before the call is dropped (after about five seconds) to maintain the call. If you do not press the **Power on/Start Call** key in time, the call is dropped. You must end every call by pressing the **Power off/End Call** key to release the system resources.
- **i2001**: Nortel recommends you do not use Automatic Answer for i2001 telephones, or use the i2001 for supervising agents unless you use a telephone handset. The i2001 does not support Handsfree or a headset.
- **i2002 and i2004 IP telephones**: If you connect the headset before you initialize the phone, calls are heard over the speaker. If you initialize the IP telephone before you plug in the headset, calls go to the headset as long as you have initialized the headset by pressing the headset button and then the release button. Calls always ring at the IP telephone. Every time you reconnect the headset you must initialize the headset.

- **Meridian and Norstar telephones**: If you use a headset, calls ring at the telephone and the headset, but calls go to the headset.
- **Business Series Terminals**: If you connect the headset before you connect the telephone cable to the phone jack, calls goes to the handsfree speaker. If you plug in the telephone before you connect the headset, calls go to the headset as long as you have initialized the headset by pressing the headset button and then the release button. Calls always ring at the set. Every time you reconnect the headset you must initialize the headset.
- **T7316e**: This type of telephone supports Automatic Answer.

Follow-me browsing (Multimedia Contact Center Agents only)

Follow-me browsing does not work with embedded Flash animations. If an agent clicks a Flash button, the image the agent sees is not displayed to the caller.

Tell agents that if the page they are sending to the caller contains Flash animations, they must tell the caller to display the page by, for example, clicking the Next button, or telling them what item to click on the page to display the next page.

Silent Monitor

If agents answer calls using features like Answer DN or Call Pickup on a set they are not logged onto, you cannot monitor these calls. You can do monitoring for wireless sets (including KIRK and DECT sets), only if the agent logs onto the set.

Skillset problems

Problems enabling skillsets

Before you enable skillsets, ensure that skillsets are assigned a valid CDN. If you cannot enable a skillset, ensure you assigned it a valid CDN. For information about skillset CDNs, see "Control DN" on page 54.

Problems changing skillset properties

If you cannot change a skillset's properties, there are two possible reasons:

- The Contact Center skillset is enabled.
  You must disable the Contact Center skillset before you can change the skillset properties.

- The skillset mailbox has the wrong extension number.
  Refer to "Determining a skillset mailbox number" on page 71 for how to determine the extension number of the skillset. The extension number of the skillset mailbox must be the same as the Control DN of the skillset. If the skillset mailbox has the wrong extension, you cannot change the properties for a skillset mailbox.

To change a skillset mailbox CDN

1. Start CallPilot Manager.
2. Click the **Mailbox Administration** heading.
   The Mailbox List page appears.
3. Click the **Change** link for the skillset mailbox.
   The page for the skillset mailbox appears.
4. In the **Extension** box type the CDN of the skillset.
5. Click **Submit**.

Problems viewing skillset settings

If you use Netscape Communicator version 4.77 and not all the Contact Center settings shown in this guide appear in your browser, refresh the browser by clicking the View menu and clicking Reload.

Problems transferring calls to the voicemail extension

If you create a transfer in a Routing Table, Intelligent Overflow, or Caller Input Rules, the call transfers to the Automated Attendant rather than the CallPilot extension. We recommend you transfer to the skillset mailbox rather than the voicemail extension.

Call processing problems

To achieve the most efficient use of your Contact Center, make sure you operate Contact Center within its maximum limits. If you overload Contact Center, slow or unpredictable call processing times can occur.

The Contact Center maximum configuration limits are 80 active agents, 100 active calls and 50 skillsets in BCM450 and 50 active agents, 30 active calls and 30 skillsets in BCM50. Although these are the configuration limits for Contact Center software, we recommend that you are cautious about approaching the maximum of any of these limits. Business Communications Manager has other services that also use its hardware and software resources.

As a guideline, we recommend that if you are approaching the limit for agents, active calls or skillsets, you keep the other two settings at about half their configurable maximum or less.

Excessive Call Ringback

If callers hear ringback for a long time, possibly interrupted by distribute tones, partial or full greetings, before they get an agent:

- Check whether your Transfer Ringback Timer has a high threshold value. Set your transfer callback to a higher value than the ring delay for CFNA.

- Ask agents to use the Not Ready Feature Code ([✆] [9] [0] [8]) when they are not available to take calls. As explained in "Do Not Disturb" on page 230, agents must not use Do Not Disturb. Agents must set their CFNA to the voicemail extension, or the skillset extension if they do not have a mailbox. Agent using T7316 sets, must program all Contact Center Feature codes (F904, 908 and 909) to one of the bottom five keys on each side of the display.

Calls do not distribute to certain agents

Check that the agent is logged on and available. You can view the agent in Reporting for Contact Center or supervisor monitor. Agents are automatically Logged Out or Made Not Ready if:

- a call is distributed to the agent and they do not answer the call. After the transfer callback timer has expired, the call goes back to the skillset and the agent will be made not ready or logged out, depending on your Contact Center configuration.

- if the agent has Call Forward configured on their set (CFAC, CFNA, CFB)

When using the CCRSAppSvrCfg application, you must right-click and use **Run as Administrator** for Windows Vista.

Ask your administrator to check that your CDNs are valid.

Check that lines are assigned to only to one skillset. Do not assign Contact Center lines directly to sets.

Tells agents that if they use CFNA to program their telephones CFNA to the voicemail extension, or the skillset extension if they do not have a mailbox. If agents use T7316 sets, all Contact Center Feature codes (F904, 908 and 909) must be programmed to one of the bottom five keys on each side of the display.

Set your Transfer Callback to a higher value than the ring delay for CFNA.

Contact Center never answers calls or takes a long time to answer calls

Check:

- that your skillset is enabled
- that disconnect is not the first step of a routing table
- in your skillset parameters how long your Delay Answer is
- the number of rings configured for your Contact Center lines in Auto Attendant
- that you have correctly configured the CDN for the skillset
- To pick a Control DN, go into the Element Manager and click the Configuration tab. Then click Telephony> Sets> Inactive DNs page. Click Model and use a DN tagged as an "Application" model. Make sure the DN you are using is not already used as a skillset DN or as the MeetMe DN. Use Feature 985 (F985) to view both lists.

Contact Center calls do not follow Call Forward rules, but non-Contact Center calls do

For example, an agent is logged onto a set that is configured to CFNA to voicemail. A call is distributed to the agent, who does not answer it, and the call is returned to the skillset, but the desired behavior is to transfer the call to voicemail. Non-Contact Center calls that do not get answered do go to voicemail.

To have non-Contact Center calls to go to voicemail and Contact Center calls to return to the skillset, make sure that the number of rings for Call Forward to Voicemail is set to greater than the Transfer Callback Timer.

To have both Contact Center and non-Contact Center calls to go to voicemail, make sure that the number of rings for Call Forward to Voicemail is set to less than the Transfer Callback Timer.

Also make sure that Call Centre agents have a CFNA Delay to voicemail/skillset DN that is lower than the Transfer Callback setting. This way, unanswered Contact Center calls return to the originating skillset and non-Contact Center calls are forwarded to the agent's personal mailbox.

Contact Center call routed to Auto Attendant cannot connect to the Operator

Check CallPilot Manager for the following configurations:

- In CallPilot Manager>Operations>Operator Settings-Is the Attendant Available check box selected and is the Attendant field blank? If the Attendant field is blank, you must assign a DN for the Auto Attendant.

In CallPilot Manager>Contact Center>CLID/DNIS Routing Table- Check your CLID/DNIS Routing Table for a rule that moves a call from the original skillset (that has no Attendant Extension defined in the skillset properties) to another skillset (that does have an Attendant Extension defined in the skillset properties).

If the caller is transferred from a skillset, with no Attendant DN, to a skillset, with an Attendant DN, and the caller presses 0 to connect to the operator, the caller hears the prompt "The operator is not available" and is returned to the Auto Attendant.

Although the call transfers to a skillset with an Attendant Extension, the call always retains the Attendant Extension of the original skillset, which in this configuration does not have an Attendant Extension. This also applies to the MWI DN skillset property.

Chapter 19
Contact Center Programming Record

For this programming task	see	on page
Record the Feature Codes used by Contact Center	Feature Codes	236
Record the line information for lines answered by Contact Center	Line answering	246
Record the Operator and Business Status settings	Operator/Business Status	236
Record the number of reserved channels, the Primary and Secondary Alert times and the Master Client Address	General Contact Center properties	236
Record agent ID, agent name, supervisor status and skillset for each agent	Contact Center agents	240
Record Control DN, skillset name, MWI ext, Method, Break Time and Delay Answer time limit	Contact Center skillsets	237
Record greeting numbers and information about them	Contact Center Greetings	237
Record the Intelligent Overflow Routing parameters for each skillset	Intelligent Overflow Routing	239
Record agents assigned to the skillsets	Skillset assignments	241
Record the skillset mailbox name, skillset mailbox number, MWI extension and skillset mailbox password	Skillset mailboxes	242
Record the type of step and step parameters for Day and Night Routing Tables	Routing Tables	243
Record Caller Input Rules	Caller Input Rules	244
Record CLID/DNIS Routing	Intelligent CLID/DNIS Routing	245
Record Line Answering details	Line answering	246

Note: Make copies of these pages as required.

Feature Codes

Feature code name	Dialpad buttons	Custom Feature Code
Display Waiting Calls	✆ 9 0 9	✆ 9 _____ _____
Open Mailbox	✆ 9 8 1	✆ 9 _____ _____
Log on/Log off	✆ 9 0 4	✆ 9 _____ _____
Not Ready	✆ 9 0 8	✆ 9 _____ _____
Voicemail DN	✆ 9 8 5	✆ 9 _____ _____
Operator status	✆ 9 8 2	✆ 9 _____ _____
Supervise	✆ 9 0 5	✆ 9 _____ _____
Supervisor Help	✆ 9 0 6	✆ 9 _____ _____

General Contact Center properties

Number of Reserved channels	
Master Client Address	
Enable Caller ID	
Supervisor Help	
CLID settings	

Operator/Business Status

Password **OPERATOR** (**67372867**)			
Receptionist or Operator available*		Y N	
Business open*		Y N	
Answer lines		Y N	
Receptionist or Operator extension			
Contact Center Service*	Skillset Number ___	Auto	
		Manual	Day Night
	Skillset Number ___	Auto	
		Manual	Day Night

* These settings are usually changed by the receptionist or Operator on a daily basis.

Contact Center skillsets

Skillset parameter	Rules	Default	Skillset #
Skillset name	Maximum 16 characters	SKILLn	
Control DN (CDN)	Extension cannot be used by another telephone or peripheral		
MWI extension			
Method	Least Busy or Preferred	Least Busy	
Break Time	Enter as mm:ss minimum: 00 min 00 sec maximum: 59 min, 59 sec	00:30	
Delay answer	Enter as mm:ss minimum: 00 min 00 sec maximum: 10 min 00 sec	00:00	
Attendant ext	Attendant extension for the skillset. If clear, the operator extension is used	not selected	
Primary alert time limit in mm:ss			
Secondary alert time limit in mm:ss			
Use previous _ calls	The number of previous calls used to calculate EWT.	10	
EWT increase allowed		selected	
Initial Call Duration	call time used to calculate EWT before the number of calls specified in Use Previous is reached.		
Language	Primary or alternate. Appears if Bilingual is enabled in the system properties		

Contact Center Greetings

Greeting number	Greeting information

Intelligent Overflow Routing

Skillset:		
Service Mode (circle one)	**Conditions**	**Action**
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox

Contact Center agents

Agent ID and type	Agent name	Supervisor status Y/N	Names and #s of skillsets agent is assigned to	Missed Call Option	Auto Answer Y/N

Skillset assignments

Skillset name and #	Agent ID and name	Priority

Skillset mailboxes

Skillset #	Mailbox name	Mailbox number (Control DN)	MWI extension	Mailbox password

Routing Tables

Skillset # _____ **Day or Night** _____

Step #	Type of step: Greeting, Distribution, Transfer, Intelligent Caller Input Routing Basic or Advanced, Disconnect	Step parameters

Caller Input Rules

Rule table # _____ **Length: Fixed** _____ **Variable** _____

Match string	Action

Intelligent CLID/DNIS Routing

Type of call: Line, Multimedia Contact Center, CLID/ANI, DNIS	Action

Line answering

Line #	Skillset #	**# of rings** (0 to 12) for Caller ID minimum 2 rings	Expected Wait Time settings

Glossary

AA

See *Automated Attendant*.

Agent

An agent is a person who is assigned to answer calls for one or more skillsets in your contact center.

Agent ID

When you add an agent, Contact Center assigns an agent ID number you use to identify the agent. The agent uses their agent ID number and password to log on when they are ready to receive calls.

Alert times

Alert times are time limits that you assign for calls waiting in skillsets. If a call exceeds the Primary or the Secondary alert time limit, a programmed memory button indicator flashes. A slow flash means that a call has exceeded the Primary alert time. A quick flash means that a call has exceeded the Secondary alert time.

Attendant

The attendant is the person who you assign to answer an extension number. The attendant can be a receptionist, operator or target attendant.

Automated Attendant (AA)

The Automated Attendant is similar to an automatic answering service. AA answers incoming calls with a Company Greeting and a menu of options. AA routes calls in response to a caller's dialpad selections. For a greater range of options and services for incoming calls, a Custom Call Routing (CCR) menu can be assigned to play instead of the Automated Attendant menu.

Automatic Answer

Automatic Answer (previously called *Force Call*) is an agent parameter that force delivers calls to an agent. If Automatic Answer is enabled, the agent hears a tone that indicates that a call is delivered. The agent is automatically in the handsfree mode.

If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must manually answer the calls.

Break Time

Break Time is a time period you set up for agents to complete paperwork or other tasks after they finish a call. After an agent completes a call, they are taken out of the skillset for this Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code.

CCR

See *Custom Call Routing*.

CDN

See *Control Directory Number*.

Contact Center

Contact Center receives, holds and routes calls to agents in a contact center.

contact center

A contact center is a department or a business that uses Contact Center to handle numerous incoming calls. A contact center typically employs several agents to answer calls.

Contact Center Administrator

The Contact Center Administrator sets up, and manages the day-to-day operation of a contact center. The Contact Center Administrator monitors the overall performance of the contact center and balances the staffing according to call traffic demands.

Call Forward All Calls

This feature forwards all calls from a phone to another extension number. For example, all calls from a telephone can be forwarded to the CDN of a skillset.

Call Forward No Answer

This feature forwards unanswered calls from a phone to another extension number. A call is considered unanswered if no one answers the call before a specified number of rings.

Call Forward On Busy

This feature forwards all calls from a phone to another extension if all the lines assigned to the phone are busy.

CallPilot

CallPilot is a versatile business communications tool that you can use to:

- answer incoming calls
- offer callers a selection of options to route their calls or access information
- provide advanced voicemail, Auto Attendant and call handling capabilities

CallPilot includes voicemail, Auto Attendant, Custom Call Routing and Fax Answering features.

CallPilot also has optional features such as Fax, Contact Center, Desktop Messaging and Messaging that enhance your communications. What options are available to you depends on what system you use. For more information about CallPilot, see the *CallPilot Manager Set Up and Operation Guide*.

Channel

A channel is the voice path that Contact Center uses to play greetings to callers. A voice channel is also the voice path used when anyone uses a Feature Code to access.

Class of Service

The Class of Service defines the values for mailboxes.

Control Directory Number (CDN)

The Control Directory Number (Control DN or CDN) is the extension number of a Contact Center skillset. The CDN is the number used to transfer calls to a skillset. The CallPilot installer is responsible for assigning a CDN to each skillset before the skillset can be enabled.

Custom Call Routing (CCR)

CCR is a routing feature that you can program to present a customized menu of single-digit choices to callers. CCR automatically answers lines with customized menus. With CCR, callers can listen to pre-recorded messages, leave a message in a skillset mailbox or transfer to an extension. With CCR you can replace Automated Attendant menus with a more sophisticated menu that offers callers a wider range of options.

Delay Answer

Delay Answer is a feature that prevents Contact Center from answering calls and playing greetings when there are no agents available. When a skillset has Delay Answer activated, waiting callers hear ringback.

When a call comes in on a line for a skillset that does not have any free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever comes first.

Display Waiting Calls

Display Waiting Calls, (previously known as *Queue Status*), is a Feature Code that you and agents can use to display waiting calls and view real-time information about skillsets. The Display Waiting Calls/Skillset Status Feature Code shows:

- the skillset number and whether the skillset is enabled or disabled
- number of agents logged into the skillset
- number of calls waiting
- the longest wait time of a call

DN

DN is a Directory Number or an extension number.

Dynamic agent priority

If you use Enhanced or Professional Contact Center, agents can have a different priority depending upon which skillset they are logged on to. For example when an agent is a member of the English skillset, their priority can be 1 because they are fluent in English.

The same agent can have a priority of 3 when they are logged on to the Spanish skillset and, a priority of 6 when they are logged on to the German skillset.

Dynamic call priority

Call priority is distinct from agent priority. If a waiting call needs to be routed, for example when an agent becomes available, Contact Center determines which waiting call must be handled next. This is the call with the highest priority, or, if all the waiting calls have the same priority, the call with the longest wait time. Contact Center then determines the right agent to handle the call. If the skillset's method of call distribution is Preferred, Contact Center finds the available agents assigned to and logged in to the skillset, and chooses the one with the highest priority. If the method is Least Busy, the agent that has been available longest is routed the call.

Greeting Table

The Greeting Table determines which recorded greeting is played and which line is answered according to the time of day.

Indicator

See *memory button indicator*.

Intelligent Caller Input Routing, Advanced

Intelligent Caller Input Routing, Advanced lets callers route their calls based on multi-digit fixed or variable rules that you create in the Caller Input Rules Tables.

Intelligent Caller Input Routing, Basic

Intelligent Caller Input Routing, Basic (Previously called *Basic Transfer*), lets callers direct their calls to an Operator, Automated Attendant, skillset mailbox, CCR Tree or internal or external number.

Intelligent CLID/DNIS Routing

CLID/DNIS Routing is the initial routing that Contact Center calls encounter. The CLID/DNIS Routing you set up lets Contact Center route calls quickly based on their incoming line number. Callers are routed to skillsets depending on who the caller calls, the line the call comes in on, or where the caller is calling from.

Intelligent Overflow Routing

Intelligent Overflow Routing uses routing rules you create to overflow, change the priority of, and move calls to multiple skillsets, a skillset mailbox, an internal or external number, a mailbox, a CCR Tree, the Automated Attendant or an operator.

Least Busy

Least Busy, (previously called *Longest idle*) is a method of call distribution that routes calls to the agent who has been available the longest. The other method of call distribution is Preferred.

MWI

See *Message Waiting Indication*.

Memory button indicator

Memory button indicators are the triangular-shaped indicators on a phone next to the memory buttons. Memory button indicators can be used to monitor call activity and view the Login/Logout status and the Not Ready status of agents.

Message Waiting Indication (MWI)

The Message Waiting Indication appears on a phone display as *Message for you* when there are new messages.

Message Waiting Indication extension (MWI extension or MWI DN)

For each skillset mailbox, you can assign a phone as the designated MWI extension. The Message Waiting Indication extension is an optional phone number that indicates when a skillset mailbox has messages waiting. The MWI extension that you assign shows *Message for you* on the phone display when there are new messages in the skillset mailbox.

Method of Call Distribution (Method)

The method of call distribution determines which of several available agents to route the call to. There are two methods of call distribution: Least Busy and Preferred. Least Busy routes calls to an agent who has been available the longest. Preferred routes calls to the agent with the highest priority (the best qualified agent).

Not Ready

Not Ready, (previously known as *Make Busy*), is a Feature Code that extends a Break Time if agents need additional time after a call to do paperwork or other tasks.

Off-premise Message Notification

Off-premise Message Notification is a feature that notifies you at a destination number when there are new or urgent messages in a skillset mailbox.

Priority

You assign a priority to each agent according to their qualifications. On Enhanced and Professional Contact Center, agents can have *dynamic agent priority*.

Primary alert time

The Primary alert time is the first time limit that you assign for calls waiting in skillsets. If a call exceeds the Primary alert time limit, you are given a visual warning on programmed memory button indicators. The other alert time is Secondary alert time.

Make Not Ready (Return to Skillset)

Make Not Ready (Return to Skillset), (previously known as *Auto Make Busy*) is an agent property that controls how a call is treated if an agent does not answer the call. Make Not Ready assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Automatic Logout automatically logs an agent out of their skillset if they do not answer a call.

Real time

Real time is a term for when there is very little response time between when an event occurs and when the information about the event is displayed. You can monitor the real time or current situation of agents and call activity by using the Display Waiting Calls Feature Code.

Reserved channel

Reserved channels are voice channels reserved exclusively for Contact Center. Reserved channels are used to play greetings to callers waiting in a skillset. These channels ensure that CallPilot does not use all the voice channels. See also *voice channel*.

Routing Table

Routing Tables handle incoming calls for each skillset. A Routing Table determines the order of greetings and hold times for callers while they wait to be routed to an available agent.

Skillset

Skillsets, (previously called *queue*s) collect and distributes calls for departments such as “sales” and “technical support”. If several calls arrive at the same time, the calls are held in a skillset where callers hear greetings and are put on hold until an agent is available.

Skillset mailbox

A skillset mailbox stores messages left by callers. The calls can be retrieved by designated agents.

Skillset name

The skillset name is a maximum of 16 characters. A skillset name is the same as the skillset mailbox name.

Supervisor

A supervisor is an agent with supervisor status. A supervisor has additional capabilities, such as the ability to monitor calls between agents and callers.

Supervisor monitor

Supervisor monitor is a feature supervisors can use to monitor or participate in calls between agents and callers.

Voice channel

A voice channel is the voice path that Contact Center uses to play greetings to callers.

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